

27 JUL 1979

MEMORANDUM FOR: Deputy Director for Administration

FROM : Director of Personnel

SUBJECT : Proposal to Initiate More Direct Management Support for the Combined Federal Campaign (CFC)

1. Action Requested: That you take the action recommended in paragraph four to encourage employee participation in the forthcoming Combined Federal Campaign.
2. Background: Tentative plans have been made to conduct the 1979-1980 CFC from 20 September through 2 November. In the past, it has been the procedure to announce the commencement of the Campaign by means of a memorandum signed by the Director. Other agencies, who have conducted successful Campaigns in the past, have determined that although an announcement by the agency head does represent upper management support of the Campaign, this message is too general and impersonal to effectively solicit maximum support from employees. These agencies have enlisted the active participation and support of their individual deputy directors and office heads. NFAC has used a similar system with great success. The Deputy Director of NFAC took an active interest in previous Campaigns by encouraging Office Heads to discuss current results throughout the Campaigns. Discussions and evaluations regarding the current CFC reports were usually included in the weekly Monday morning staff meeting.
3. Staff Position: Activities such as publishing announcements, encouraging subordinates to participate in this worthwhile cause and periodic monitoring of results should illustrate to employees that upper management is taking positive action and is making a definite commitment to help ensure that the Campaign is a success.
4. Recommendation: It is recommended that you discuss the virtue of more direct management support for the Combined Federal Campaign at a Deputy Directors' meeting in early September and indicate that the Office of Personnel is eager to assist in any way possible.

Harry E. Fitzwater

Harry E. Fitzwater

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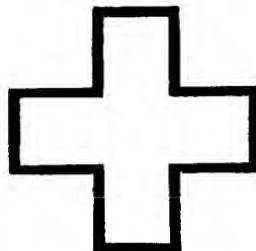
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*Manual on*

# FUND-RAISING WITHIN THE FEDERAL SERVICE

*for Voluntary Health and Welfare Agencies*



## EXECUTIVE ORDER 10927

### ABOLISHING THE PRESIDENT'S COMMITTEE ON FUND-RAISING WITHIN THE FEDERAL SERVICE AND PROVIDING FOR THE CONDUCT OF FUND-RAISING ACTIVITIES

By virtue of the authority vested in me as President of the United States, it is ordered as follows:

Section 1. The President's Committee on Fund-Raising Within the Federal Service, established by Executive Order No. 10728 of September 6, 1957, is hereby abolished, and that order is hereby revoked.

Section 2. (a) The Chairman of the Civil Service Commission shall make arrangements for such national voluntary health and welfare agencies and such other national voluntary agencies as may be appropriate to solicit funds from Federal employees and members of the armed forces at their places of employment or duty stations.

(b) In making the arrangements required by subsection (a) of this section, the Chairman of the Civil Service Commission is authorized to consult with appropriate interested persons and organizations, the national voluntary agencies, and the executive departments and agencies concerned. Such arrangements shall (1) permit true voluntary giving and reserve to the individual the option of disclosing his gift or keeping it confidential; (2) designate specific periods during which solicitations may be conducted; and (3) provide for not more than three solicitations annually, except in cases of emergency or disaster appeals for which specific provision may be made by the Chairman of the Civil Service Commission.

Section 3. This order shall not apply to solicitations conducted by organizations composed of civilian employees or members of the armed forces among their own members for organizational support or for benefit or welfare funds for their members. Such solicitations shall be conducted under policies and procedures approved by the head of the department or agency concerned.

Section 4. All records and property of the President's Committee on Fund-Raising Within the Federal Service are hereby transferred to the Chairman of the Civil Service Commission.

Section 5. This order shall become effective forty-five days after its date.

JOHN F. KENNEDY

THE WHITE HOUSE  
March 18, 1961.

*Manual on*

# FUND-RAISING WITHIN THE FEDERAL SERVICE

*for Voluntary Health  
and Welfare Agencies*



Office of the Chairman  
United States Civil Service Commission

*May 1963*

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For sale by the Superintendent of Documents, U.S. Government Printing Office  
Washington 25, D.C.



## FOREWORD

Government policy has long approved the solicitation of contributions from Federal personnel for the support of voluntary health and welfare agencies in our society. These worthy agencies complement and reinforce our tax-supported institutions in a manner that is vital to the community and the Nation.

The fund-raising program described in this manual was established by the President in response to a need for orderly and effective arrangements for solicitations in the Federal service. It includes special provisions to insure true voluntary giving by civilian employees and members of the armed forces to the organizations that they wish to support.

The worthwhile efforts of our voluntary agencies merit generous contributions from all Federal personnel. I urge the heads of executive departments and agencies to insure that their fund-raising campaigns receive full support in all offices and installations of the government.



JOHN W. MACY, JR.  
*Chairman*

### *A Loose-leaf Reference Publication*

This manual is the official medium of the Chairman of the U.S. Civil Service Commission for issuing policy, procedural and informational material of a reference nature about the fund-raising program in the Federal service. It is for the guidance of Federal officials and representatives of recognized voluntary health and welfare agencies.

To permit the manual to be kept current and complete, it is in loose-leaf form and revisions are issued as replacement pages. Revised pages and instructions for pen-and-ink changes are conveyed by a numbered series of transmittal sheets. The transmittal sheets describe the nature of the revision, and the replacement pages identify the specific changes in the text by a star at the beginning and at the end of revised material. The deletion of part of a paragraph is indicated by two consecutive stars; of an entire paragraph by a line of stars. Transmittal sheets should be filed in numerical order in the back of the book as a check on the receipt of all numbers issued.

There are no binders or tabs designed specifically for the manual. Manual material is punched to fit an ordinary three-ring binder.

### *Information for Coordinating Purposes*

A Fund-Raising Bulletin is issued by the Chairman of the Civil Service Commission each spring to announce the national voluntary agencies approved for solicitation privileges in the Federal service during the ensuing fiscal year. It is transmitted as a change to the manual for inclusion in the Appendix.

As a further aid in program administration, the Appendix lists the names of Federal officials who have special responsibilities for coordination of fund-raising activity at the national level and in certain centers of Federal employment in the field service. While reference lists are subject to fairly frequent change, the widespread need for this information by Federal personnel and voluntary agency representatives makes its inclusion advisable. The lists will be revised as needed but no more frequently than semiannual.

A detailed guideline for effective campaigning on the job is incorporated as a separate item in the Appendix in suitable form for reproduction and distribution to Federal campaign officials and keymen as needed in large establishments.

### *Procurement and Distribution Within the Federal Service*

Federal departments and agencies are expected to purchase the number of copies of the manual and manual revisions they need by requisition from the Government Printing Office. It should be distributed to all points within the agency that usually maintain administrative regulations. As a minimum, a copy of the manual should be available at all places of employment or major duty stations. It may be reproduced for incorporation in an agency's own administrative manual system.

### *Purchase by Voluntary Agencies*

Voluntary health and welfare agencies and other non-Federal organizations cannot use the official requisition procedure described above. However, the manual may be purchased on a subscription basis from the Superintendent of Documents, Government Printing Office, Washington 25, D.C. The subscription price covers the cost of the basic publication plus an indefinite number of revisions. Subscribers will be notified by the Government Printing Office when to renew their subscriptions.

### *Inquiries About the Program*

Technical questions or complaints about the application of provisions of the program in connection with campaigns held in a particular department or agency should be addressed to the Fund-Raising Program Coordinator of the agency named in the Appendix. General inquiries about the program as it applies in more than one agency should be addressed to the appropriate Federal coordinating group listed in the Appendix, if there is one at the location involved, or to the Assistant to the Chairman, U.S. Civil Service Commission, Washington 25, D.C.

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## GENERAL INFORMATION

**1.1 PURPOSE OF THE PROGRAM.** To establish policies and procedures governing the solicitation of Federal military and civilian personnel for contributions to private charitable and other humanitarian organizations.

**1.2 BACKGROUND.** It has long been Government policy to cooperate with and assist voluntary health and welfare agencies to solicit funds from Federal personnel in support of their worthy causes. Some years ago, however, the increasing number of fund drives began to create an administrative burden. Federal officials found themselves besieged by dozens of agencies seeking endorsements and the privilege of soliciting employees on the job. Employees were vexed, and frustrated at the multiplicity of appeals—as many as 10 to 20 a year in some departments. After extensive study of the situation, a uniform program was established in 1956 to limit the number of campaigns and insure true voluntary giving by Federal personnel. The program was monitored by the President's Committee on Fund Raising Within the Federal Service until the committee was abolished and its responsibilities assigned to the Chairman of the U.S. Civil Service Commission by Executive Order 10927 of March 18, 1961.

**1.3 SCOPE.** The program governs all fund raising by private voluntary agencies among Federal employees and members of the armed forces at their places of employment or duty stations. Thus, it is applicable to the 5 million civilian and military personnel of all executive departments and agencies wherever stationed throughout the world. It does not apply to solicitations by organizations of Federal employees or members of the armed forces among their own members for organizational support or for benefit or welfare funds for their members. These solicitations are excepted from the uniform program by section 3 of Executive Order 10927 and are conducted under rules

approved by the head of the department or agency concerned.

**1.4 LEGAL AUTHORITY.** The policies and procedures prescribed in this manual are directed to the heads of all executive departments and agencies under the authority of Executive Order 10927.

### 1.5 SUMMARY DESCRIPTION OF THE PROGRAM

**.51 *Eligibility of National Voluntary Agencies.*** National voluntary agencies apply to the Chairman of the Civil Service Commission for on-the-job solicitation privileges in the Federal Government. He issues annually a list of agencies which have been found acceptable under prescribed standards as to program objective, administrative integrity, and financial responsibility.

**.52 *Assigned Campaign Periods.*** Federal fund-raising campaigns are assigned to fall, winter, or spring periods. In the United States, generally the fall period is allocated to united funds, community chests, or other local federated groups; the winter period to national health agencies and international relationship agencies; and the month of March to the American Red Cross, except in communities where it participates in a local united fund. Overseas, the fall is assigned to international relationship agencies, the winter to national health agencies, and the March period to the Red Cross.

**.53 *Joint Arrangements.*** Recognized national voluntary agencies which have been assigned to the same period are required to coordinate solicitation arrangements at all locations where they run campaigns. Thus, for example, the winter period in the United States has concurrent campaigns by a group of national health agencies and a group of international relationship agencies. Group campaigns are developed by the participating agencies under administrative arrangements which provide for individual

agency identification, educational opportunities for each agency, and allocation of contributions in accordance with the specific designations by donors.

.54 Decentralized Operations. Voluntary agency representatives initiate campaigns in their assigned periods by direct contact with the heads of Federal offices and installations in local communities. Each Federal agency conducts a personal solicitation among its employees, using campaign materials, supplies and speakers furnished by the voluntary agencies.

.55 Voluntary Solicitation Methods. Employee solicitations are conducted during duty hours using methods which permit true voluntary giving and reserve to the individual the option of disclosing his gift or keeping it confidential.

.56 Off-the-job Solicitation. Many worthy voluntary agencies do not participate in the on-the-job program because they do not wish to

join in its coordinated arrangements or because they cannot meet the requirements for eligibility. Such agencies may, of course, solicit Federal employees at their homes, as they do other citizens of the community, or appeal to them through union, veteran, civic, professional or other private organizations to which they belong. In addition, limited arrangements may be made for off-the-job solicitation on military installations and at entrances to Federal buildings.

1.6 GENERAL POLICY ON CIVIC ACTIVITY. Federal personnel are encouraged to participate actively in the work of recognized voluntary agencies—as members of policy boards or committees, heads of local campaign units, or volunteer workers—to the extent consistent with agency policy and prudent use of official time. They are encouraged, also, to devote as much of their private time as possible to such volunteer work in the public interest.

## ORGANIZATION AND FUNCTIONAL RESPONSIBILITIES

### NATIONAL LEVEL

#### 2.1 DEVELOPMENT OF POLICY AND PROCEDURES

.11 Chairman of the Civil Service Commission. The Chairman is responsible under Presidential authority for establishing fund-raising policies and procedures in the executive branch. With the advice of interested organizations and the Federal departments and agencies, he makes all basic policy, procedural, and eligibility decisions for the program.

.12 Advisory Council. The Council is composed of four members appointed by the Chairman to assist and advise him in the development of policies, procedures, and eligibility requirements. Its membership is representative of the voluntary agencies which participate in the Federal program, as follows:

- a. The President of the American National Red Cross.
- b. The President of the United Community Funds and Councils of America, Inc.
- c. The President of a participating national health agency, as designated on a rotating basis.
- d. The President of a participating international agency, as designated on a rotating basis.

.13 *Policy Committee*  
Coordinating Group. Appointed by the Chairman, this group provides direct working participation by Federal agencies and employee organizations in the development of the program. It is composed of a selected number of Fund-Raising Program Coordinators from the executive departments and agencies and the presidents, or their personal representatives, of the largest employee organizations in the Federal service. It acts through general meetings and ad hoc working committees.

.14 *Committee*  
Eligibility Board. The Board consists of a chairman and four members selected by the

Chairman from the membership of the Coordinating Group. It is responsible for recommending to the Chairman:

- a. Eligibility determinations on national voluntary agencies.
- b. Assignment of campaign periods.
- c. Decisions on emergency or disaster appeals.
- d. Decisions on jurisdiction under section 3 of the Executive Order, i.e. whether a special agency solicitation is properly exempt from the Federal program.
- e. Modification of eligibility standards and requirements as needed.

#### 2.2 PROGRAM ADMINISTRATION

.21 Federal Agency Heads. The head of each executive department and agency is responsible for:

- a. Seeing that voluntary fund-raising within his department or agency is conducted in accordance with the policies and procedures prescribed by this manual.
- b. Designating a top-level representative as Fund-Raising Program Coordinator to work with the Chairman of the Civil Service Commission as necessary in the administration of the fund-raising program within his department or agency.

.22 Fund-Raising Program Coordinators. The responsibilities of agency Fund-Raising Program Coordinators are to:

- a. Cooperate with the Chairman of the Civil Service Commission and the representatives of national voluntary agencies in the development and operation of the program.
- b. Maintain direct liaison with the Office of the Chairman in the administration of the program.
- c. Publicize program requirements throughout the department or agency.
- d. Answer inquiries about the program from officials and employees of the department or agency and from external sources.



- e. Investigate and arrange for any necessary corrective action on complaints alleging violation of program requirements within offices or installations of the department or agency.

A list of the Fund-Raising Program Coordinators is included in the APPENDIX.

**2.3 PROGRAM COORDINATION.** The Office of the Chairman, Civil Service Commission, coordinates the administration of the fund-raising program by the departments and agencies and maintains liaison with national voluntary agencies.

#### LOCAL COMMUNITY LEVEL

**2.4 LOCAL VOLUNTARY AGENCY REPRESENTATIVES.** State and local representatives of the recognized voluntary agencies are furnished policy and procedural guidance on the Federal program by their national organizations. They are responsible for:

- a. Initiating local campaigns in the Federal establishment.
- b. Furnishing educational and other campaign materials, speakers, and operational forms and envelopes appropriate to the Federal program.

**2.5 LOCAL FEDERAL AGENCY HEADS.** The heads of local Federal offices and installations are furnished the instructions in this manual by direction from the heads of their departments and agencies. They are responsible for:

- a. Cooperating with State or local representatives of approved voluntary agencies and with the local Federal coordinating group, where one exists, in organizing local Federal campaigns.
- b. Undertaking official campaigns within their offices or installations and providing active and vigorous support with equal emphasis for each authorized campaign.
- c. Seeing that personal solicitations on the job are organized and conducted in accordance with the procedures in Chapter 5.
- d. Insuring that authorized campaigns are kept within reasonable administrative limits of official time and expense.

**2.6 LOCAL FEDERAL COORDINATING GROUPS.** In local areas where there are a

number of Federal offices and installations some interagency coordination is necessary in order to achieve effective community-wide campaigns and to improve general understanding and compliance with the program. The responsibility for local coordination is assigned by the Chairman of the Civil Service Commission to existing organizations of Federal agency heads where possible and to special committees at other locations where coordination is needed.

**.61 *Authorized Groups.*** Coordinating responsibility is assigned to the following organizations:

- a. *Federal Executive Boards.* These boards exist in principal cities of the United States for the purpose of improving executive branch cooperation. They are composed of local Federal agency heads who have been designated by the heads of their departments and agencies under authority of the President's Memorandum of November 10, 1961.
- b. *Federal Business Associations.* These are self-organized associations of local Federal officials which exist at many points of Federal concentration for the purpose of general interagency cooperation.
- c. *Fund-Raising Program Coordinating Committees.* These committees are established in other communities as needed, under the authority of E.O. 10927. Leadership in organizing such a committee is the responsibility of the head of the local Federal installation having the largest number of civilian and military personnel. The committees are composed of local Federal agency heads or their designated personal representatives and have self-determined organizational arrangements.

A list of local Federal coordinating groups is included in the APPENDIX.

**.62 *Coordinating Responsibilities.*** Within the limits of the policies, procedures and arrangements made nationally, the fund-raising responsibilities of local Federal coordinating groups are to:

- a. *Facilitate local campaign arrangements.* To the extent needed or requested by voluntary agency representatives, the coordinat-

ing group (1) recommends high-level chairmen for the authorized Federal campaigns, (2) provides lists of Federal activities and their personnel strength, (3) cooperates on interagency briefing sessions and kick-off meetings, and (4) supports appropriate publicity measures needed to assure campaign success.

- b. *Improve understanding and compliance with program policies and procedures.* Each local Federal agency head receives fund-raising directives through his agency channels and can raise questions by the same means. However, the coordinating group serves as the central medium for resolving such questions locally to the extent possible without referral to the national level.
- c. *Interpret the program to community leaders.* The fund-raising program is responsive to the needs of a great many voluntary agencies, but it cannot accommodate to the desires and methods of all. The coordinating group (1) explains to community leaders the special arrangements and conditions of the Federal program and the considerations which entered into its development, and (2) publicizes appropriate

information regarding the response of Federal military and civilian personnel to the approved campaigns.

- d. *Act upon local campaign problems.* Working relations between voluntary agencies and local Federal leaders are generally well established and operating problems are at a minimum. While continuing this high level of effective cooperation, the coordinating group is responsible for acting upon any problems of apparent noncompliance by voluntary agencies with the campaign arrangements and procedures of the Federal program.
- e. *Communicate with the Office of the Chairman of the Civil Service Commission.* The coordinating group refers unresolved local fund-raising questions or problems that are common to several agencies direct to the Office of the Chairman for decision. Single-agency problems are referred through customary agency channels. The Chairman of the Civil Service Commission communicates directly with the Chairman of the local coordinating group when information about the local fund-raising situation is needed.

## CAMPAIGN ARRANGEMENTS FOR VOLUNTARY AGENCIES

**3.1 TYPES OF VOLUNTARY AGENCIES.** Voluntary agencies are private, self-governing organizations financed primarily by contributions from the public. Some are national in scope, with a national organization and state or local chapters or affiliates. Others are primarily local both in form of organization and extent of services. The Federal program involves solicitation arrangements for four broad categories of such agencies:

- a. Local health, welfare, or recreational service agencies, such as visiting nurse associations, homes and clinics for children and the aged, and neighborhood centers for youth recreation and guidance.
- b. National and international welfare, recreational service and emergency relief—the American National Red Cross.
- c. National health agencies providing research and public education on a national basis in addition to local services, such as the American Cancer Society and American Heart Association.
- d. National agencies having an international relationship function which involves health, welfare or freedom-building programs in foreign countries, such as CARE and Radio Free Europe.

**3.2 TYPES OF FUND-RAISING METHODS.** The methods used by voluntary agencies in public fund raising are usually characterized as federated or independent. A *federated* campaign typically is one conducted by a local community chest, or by a united fund when the local Red Cross chapter participates. In these cases local voluntary agencies join contractually into a single organization for fund-raising purposes. Usually they also admit local chapters or affiliates of some national agencies as participating members. An *independent* campaign is one conducted by a local or national voluntary agency through its own fund-raising organiza-

tion. Some national agencies conduct only independent campaigns, as a matter of agency policy. Others campaign independently or participate in federation depending upon local circumstances and the admission policies of local federated groups.

**3.3 CONSIDERATIONS IN MAKING FEDERAL ARRANGEMENTS.** With the number of worthy voluntary agencies and their major differences in organization and fund-raising policy, coordinated arrangements are necessary in order to provide Federal employees an opportunity, within reasonable administrative expense, to contribute to the agencies of their choice. Basic arrangements are made nationally in view of the national scope of many of the voluntary agencies. Campaign operations are decentralized under provisions that accommodate to the varying situations in local communities. Both federated and independent fund-raising policies are supported since each responds to a legitimate purpose of the voluntary agencies involved. However, in order to keep the number of on-the-job solicitations to the practical minimum independent appeals must be grouped into joint campaigns of agencies having similar characteristics, e.g. the National Health Agencies, the Joint Crusade (of international relationship agencies), and the American Overseas Campaign.

### 3.4 DEFINITION OF TERMS USED IN FEDERAL ARRANGEMENTS

**.41 *Domestic Area.*** The 50 United States, the Panama Canal Zone, and the Commonwealth of Puerto Rico.

**.42 *Overseas Area.*** All other points in the world where Federal employees or members of the armed forces are stationed.

**.43 *Federated Community.*** A location within the domestic area where a federated fund-raising program is operated by national and

local voluntary agencies through a community chest, united fund or other local federated group which is a member in good standing of, or is recognized by, the United Community Funds and Councils of America, Inc.

*.44 Nonfederated Community.* A location within the domestic area where there is no federated fund-raising program or where the federated program does not include any national voluntary agency of the types defined in paragraphs 3.45 and 3.46.

*.45 Recognized National Voluntary Agency.* An agency which has been declared eligible by the Chairman of the Civil Service Commission for participation in independent or joint campaigns in the Federal establishment.

*.46 National Voluntary Agency "Supported Primarily through United Funds and Community Chests."* An agency which generally solicits within the Federal establishment as a participating member of community chests, united funds or other local federated groups which are members in good standing of, or are recognized by, the United Community Funds and Councils of America, Inc., for example, United Service Organizations, Inc. (USO). Such an agency is not recognized for participation in independent or joint campaigns except with respect to nonfederated communities and the overseas area.

### 3.5 POLICIES GOVERNING FEDERAL ARRANGEMENTS

*.51 Campaign Arrangements Established Nationally.* The basic campaign arrangements in this chapter have been established by the Chairman of the Civil Service Commission after consultation with representatives of national voluntary agencies, the executive departments and agencies, and Federal employee organizations. Commitments are made nationally in order to make it possible for the independent national voluntary agencies to develop and administer joint campaigns in the Federal establishment. Therefore, local Federal agency heads are not authorized to vary from the established arrangements except to the extent that local variations are expressly provided for.

*.52 Number of Solicitations.* Not more than three solicitations on the job will be made annu-

ally at any location, on behalf of voluntary health, welfare, or international relationship agencies, except in the case of an emergency or disaster appeal for which specific prior approval has been granted by the Chairman of the Civil Service Commission. At locations where the Red Cross participates in a local federated campaign not more than two such solicitations will be made annually.

*.53 No Duplicate or Supplemental Campaigns.* No voluntary agency may be permitted to solicit Federal personnel at place of employment or duty station more than once in any year except in the case of an approved emergency or disaster appeal.

*.54. Responsible Conduct.* Solicitation privileges may be withdrawn from a voluntary agency at any time by the Chairman of the Civil Service Commission, after due notice and opportunity for consultation, in the event it fails to adhere to the eligibility requirements, policies and procedures of the Federal program.

#### *.55 Federated Campaigns*

*.551 Authorization.* A local community chest, united fund or other local federated group which is a member in good standing of, or is recognized by, the United Community Funds and Councils of America, Inc. is authorized on-the-job solicitation privileges in its local campaign area.

*.552 Other Agencies Excluded.* In a federated community as defined in paragraph 3.43, local voluntary agencies and national voluntary agencies "supported primarily through united funds and community chests" are not authorized to solicit on the job except as participating members of the local fund or chest.

*.553 Single Fund-Raising Agency.* A local community chest, united fund or other local federated group will be considered and supported as a single agency in order to safeguard its contractual agreements with members as to the distribution of gifts. Whether gifts may be designated to specific member agencies is governed by local policy of the federation.

*.554 "Causes" Excluded.* Solicitation for a health "cause," e.g. for "Mental Health," "Heart Disease," without identification of the specific voluntary agency for which the funds are

sought, is not authorized. If "causes" are listed within the framework of a united fund or community chest all funds collected from Federal personnel must be allocated only to specific voluntary agencies in accordance with the contractual agreements of the fund or chest.

*.555 Campaign Period.* The fall of the year is reserved for community chest, united fund, and other local federated campaigns or coordinated solicitations in the Federal establishment.

*.56 Coordinated Solicitations in Nonfederated Communities and Mixed Areas.*

*.561 Nonfederated Communities.* In a nonfederated community as defined in paragraph 3.44, recognized national voluntary agencies and national voluntary agencies "supported primarily through united funds and community chests" are eligible to participate with purely local voluntary agencies in a coordinated solicitation during the fall of the year. Purely local voluntary agencies must have earned good will and acceptability within the overall geographic area covered by the campaign. The eligibility of local agencies desiring to join in the solicitation will be determined by the local Federal coordinating group where one exists.\* The standards in Chapter 4 will be used as guidelines in determining eligibility. The local and national voluntary agencies that are eligible to participate in a coordinated solicitation will be responsible for developing an appropriate fund-raising organization to handle all phases of the campaign. Campaign arrangements in consonance with the Federal program will be worked out by the local Federal coordinating group with the local voluntary fund-raising organization.

*.562 Mixed Areas.* In an area where a Federal installation overlaps or is part of two or more federated or nonfederated communities, the Federal coordinating group\* is authorized to develop a coordinated solicitation best suited to the needs of the locality. Arrangements in consonance with the Federal program will be

\*See APPENDIX for locations. In the absence of an authorized Federal coordinating group, eligibility determinations may be made by the head of the Federal installation concerned. If there is more than one installation a Fund-Raising Program Coordinating Committee as described in paragraph 2.61c should be established for this purpose.

worked out on a mutually agreeable basis with the representatives of the local and national voluntary agencies and federated groups in adjacent or nearby communities in which the Federal personnel reside.

*.57 Independent Campaigns*

*.571 American National Red Cross.* The month of March is reserved for independent campaigns by the Red Cross at all locations where it is represented by a chapter:

- a. Which does not participate in a united fund or other federated campaign.
- b. Which is organized to serve the community within which or nearby is located the Federal office or installation.

*.572 Joint Campaigns of Other Recognized National Voluntary Agencies.* Joint campaigns are authorized under administrative arrangements developed by and mutually acceptable to the participating voluntary agencies, which must include the following conditions:

- a. *Joint and Concurrent Operation.* Recognized national health agencies will conduct one joint campaign and international relationship agencies another; the two groups will solicit concurrently in the same period at all authorized locations.
- b. *Authorized Locations—Health Agencies.* Each recognized national health agency may participate at those locations where it is represented by a state or local chapter or affiliate:
  - (1) Which does not participate in a local united fund or community chest campaign.
  - (2) Which is organized to serve the community within which or nearby is located the Federal office or installation.
  - (3) Which shares fully in the planning, work and expense of the local joint campaign.

Each voluntary agency's designated representative will annually certify in writing to the appropriate state coordinating committee of the Federal Service Campaign for the National Health Agencies a list of the locations in the state (counties) where its chapters or affiliates meet the required conditions.

- c. *Authorized Locations—International Relationship Agencies.* Each recognized international relationship agency may participate at those locations where an authorized representative shares fully in the planning, work and expense of the local joint campaign.
- d. *Agency Identification.* Each participating national agency will be specifically identified by name in the joint campaign material provided to potential givers.
- e. *Educational Opportunity.* Each participating national agency will be allowed to tell about its purpose and program in the campaign material provided to potential givers.
- f. *Designation of Gifts.* Each participating national agency will receive intact all gifts specifically designated to it by givers.
- g. *Campaign Period.* The joint campaigns will be conducted concurrently in one of the following periods:
  - (1) January 1 to February 15—in communities where the local Red Cross chapter conducts an independent campaign during March.
  - (2) Any continuous 6 weeks' period between January 1 and April 30—at all other locations in the domestic area. The exact period is locally determined by the joint campaign organizations.

#### .58 Overseas Campaigns

.581 *American National Red Cross.* An independent campaign is authorized at all locations during the month of March. When required in order to meet special conditions in their areas, overseas military commanders may authorize a variation from this assigned period, by mutual agreement with appropriate Red Cross officials. Such variation may not conflict with the periods reserved for the other authorized overseas campaigns.

.582 *Joint Campaigns of Other National Voluntary Agencies.* Joint campaigns are authorized at all locations under administrative arrangements developed by and mutually acceptable to the participating voluntary agencies, as follows:

- a. *National Health Agencies.* Each national health agency recognized for campaigns

in the domestic area may participate in an overseas campaign in the 6-weeks' period January 1 to February 15.

- b. *American Overseas Campaign.* Each international relationship agency recognized for campaigns in the domestic area, and any national voluntary agency recognized for campaigns overseas only, may participate in an overseas campaign in the fall of the year.

.583 *Local Voluntary Agency Campaigns.* The heads of overseas offices and installations may, in their discretion, permit the solicitation of their military and civilian personnel for purely local voluntary agencies. Such campaigns will be conducted in accordance with the basic policies and procedures of the Federal program and at times which do not conflict with the periods reserved for the campaigns of recognized national voluntary agencies. The eligibility standards in Chapter 4 may be used as guidelines in determining the eligibility of local voluntary agencies. Federal leadership in organizing such campaigns will be assumed by the head of the overseas Federal establishment having the largest number of U.S. personnel in the locality of the campaign.

.584 *Optional Participation by Certain Civilian Agencies.* Federal civilian departments and agencies which have traditionally considered their overseas personnel as members of the National Capital Area for fund-raising purposes may continue this practice.

3.6 OFF-THE-JOB SOLICITATION AT PLACES OF EMPLOYMENT. The program for on-the-job solicitation cannot accommodate to the various fund-raising policies and methods of all worthy voluntary agencies. However, in the discretion of the local Federal agency heads concerned, voluntary agencies which are not recognized for the on-the-job program may be authorized off-the-job solicitation privileges at places of employment under the conditions specified below. Since dual solicitation is not authorized, this privilege cannot be made available to any voluntary agency that is included, independently or as a member of a federated campaign, in the on-the-job program.

.61 Family Quarters on Military Installations.

In the discretion of the local commander, worthy voluntary agencies may be permitted to solicit at private residences or at similar on-post family public quarters in unrestricted areas of military installations. However, such solicitation may not be conducted by military or civilian personnel in their official capacity either during duty or nonduty hours, nor may such solicitation be conducted as an officially command-sponsored fund-raising project. This restriction is not intended to prohibit nor to discourage military and civilian personnel from otherwise participating as private citizens in voluntary agency activities during their off-duty hours.

.62 Public Entrances of Federal Buildings and Installations. Worthy voluntary agencies

which engage in limited or specialized methods of solicitation—for example, the use of “poppies” or other similar tokens by veterans organizations—may be permitted to solicit at entrances or in concourses or lobbies of Federal buildings and installations, provided that such locations are normally open to the general public. The heads of the Federal agencies occupying the building or installation may authorize this privilege in their discretion. The agreement with the local representatives of the voluntary agency will specify the authorized locations, the number of solicitors that may be used, and any other reasonable limitations considered necessary. Where appropriate, the occupant Federal agencies concerned will coordinate the granting of any such privilege with the building or installation manager.



## ELIGIBILITY REQUIREMENTS FOR NATIONAL VOLUNTARY AGENCIES

4.1 PURPOSE. These eligibility requirements are established to insure that:

- a. Only responsible and worthy voluntary agencies are permitted to solicit on the job in Federal installations.
- b. The funds contributed by Federal personnel will be used effectively for the announced purposes of the soliciting agency, and
- c. All recognized national agencies have field organizations capable of participating equitably in the joint campaign arrangements required by the Federal program.

### 4.2 GENERAL REQUIREMENTS

.21 Type of Agency. Only nonprofit, tax-exempt agencies having specific functions in the fields of health, welfare or recreational services, or in the improvement of international relationships consistent with the policies of the U.S. Government may be approved. Agencies which are supported primarily through united funds and community chests will not be recognized for participation in independent or joint campaigns except with respect to nonfederated communities and the overseas area.

.22 Integrity of Operations. Only agencies having a high degree of integrity and responsibility in the conduct of their affairs will be approved. Funds contributed to such organizations by Federal personnel must be used effectively for the announced purposes of the agency.

.23 Avoidance of Competition. To avoid solicitation competition, approval will not be granted to more than one national health agency within a single field which deals with physical handicap or disease.

.24 National Scope. The agency must demonstrate that:

- a. It is organized on a national scale with a national association which is representa-

tive of its constituent parts and which, through its board of directors, exercises close supervision over the operations and fund-raising policy of its local chapters or affiliates.

- b. It has earned good will and acceptability throughout the United States, particularly in cities or communities within which or nearby are Federal offices or installations with large numbers of personnel.
- c. It has enough fund-raising representatives at decentralized locations to be able to enter into full participation with a group of agencies in the conduct of local campaigns throughout the United States.
- d. If a national health agency, it has a well-defined national program involving research, education, and community services with sufficiently developed local chapter or affiliate coverage to implement its national program in cities or communities within which or nearby are Federal offices or installations with large numbers of personnel.

.25 Type of Campaign. Approval will be granted only for fund-raising campaigns in support of current operations. Capital fund campaigns are not authorized. Agencies must observe the policy and procedural requirements for fund raising in the Federal service.

### 4.3 SPECIFIC REQUIREMENTS

.31 Program. An active and necessary program with particular regard to the welfare of the public and the persons served; evidence of consultation and cooperation with established agencies in the same or related fields; and efficient operations.

.32 Volunteer Control. Direction of the organization by an active, voluntary board of directors which serves without compensation, holds regular meetings, and exercises effective administrative control.



.33 *Finances.* Maintenance of a financial system which includes accounting procedures acceptable to an independent certified public accountant and conduct of fiscal operations in accordance with a detailed annual budget, prepared and approved at the beginning of the year by the board of directors with prior authorization by the board of any significant variations from the approved budget.

.34 *Fund-Raising Practice.* Publicity and promotional activities based upon the actual program and operations of the agency; protection afforded against unauthorized use of agency contributors' lists; no payment of commissions for fund-raising; no mailing of unordered tickets or commercial merchandise with a request for money in return; and no general telephone solicitation of the public.

.35 *Annual Report.* Preparation of an annual report which includes a full description of the agency's activities and the names of chief administrative personnel.

.36 *Financial Reports.* Preparation of financial reports in reasonable detail, certified by an independent certified public accountant.

.37 *Source of Funds and Costs Report.* Filing of special report with Chairman of the Civil Service Commission which discloses the agency's sources of funds, fund-raising expense, and use of net funds in its most recent fiscal year.

#### 4.4 APPLICATION REQUIREMENTS

.41 *Exemptions.* The American National Red Cross and local community chests, united funds or other federated groups which are members in good standing of, or are recognized by, the United Community Funds and Councils of America, Inc. are exempt from these application requirements.

.42 *Annual Application.* To be considered for solicitation privileges in domestic or overseas campaigns in the Federal service, each national voluntary agency must file application annually.

.43 *Time and Place of Filing.* Application is filed with the Office of the Chairman, U.S. Civil Service Commission, Washington 25, D.C., and must be postmarked on or before March 1. Applicants are urged to file in January or early February if possible.

.44 *Eligibility Decisions.* Decisions as to eligibility are made by the Chairman, with the assistance of an eligibility board of government officials and employee organization leaders, and are based upon the information filed with the agency's application and other sources such as reports of the National Information Bureau.

.45 *Notice of Decision.* Applicants are notified of the decisions on their applications approximately one month after filing.

.46 *Form and Content of Application.* Applications shall be filed in the following form, with the information, documents and data specified:

- a. *Corporate Name and Fiscal Year.*
- b. *Origin, Purpose and Structure of Organization.* Furnish information to show agency meets the General Requirements stated in section 4.2. Applications limited to overseas campaign privileges only will be considered under modified requirements for paragraphs 4.24 b, c, and d.
- c. *Chapters, Affiliates or Representatives.* Furnish a list of chapters, affiliates or representatives arranged by (1) U.S. Civil Service Regions, (2) alphabetical order by states in each region, and (3) under the states, by cities with chapter, affiliate or representative by names and addresses. If application is for renewal of recognition currently in force a copy of the prior year's listing updated by pen and ink changes is acceptable. The regional areas are as follows:

BOSTON REGION	Ohio
Connecticut	Wisconsin
Maine	ST. LOUIS REGION
Massachusetts	Iowa
New Hampshire	Kansas
Rhode Island	Minnesota
Vermont	Missouri
	Nebraska
PHILADELPHIA REGION	North Dakota
Delaware	South Dakota
Maryland	SEATTLE REGION
Pennsylvania	Alaska
Virginia	Idaho
West Virginia	Montana
CHICAGO REGION	Oregon
Illinois	Washington
Indiana	NEW YORK REGION
Kentucky	New Jersey
Michigan	New York

ATLANTA REGION  
Alabama  
Florida  
Georgia  
Mississippi  
No. Carolina  
So. Carolina  
Tennessee  
Commonwealth of  
Puerto Rico  
DALLAS REGION  
Arkansas  
Louisiana

Oklahoma  
Texas  
DENVER REGION  
Arizona  
Colorado  
New Mexico  
Utah  
Wyoming  
SAN FRANCISCO REGION  
California  
Hawaii  
Nevada

CENTRAL OFFICE  
National Capital Area  
Panama Canal Zone

- d. *Program (sec. 4.31)*. Outline the program. List the names of other national voluntary agencies which offer similar services covering the whole or a part of the same field of activity and state past and current relationships with such agencies.
- e. *Volunteer Control (sec. 4.32)*. Describe board of directors' administrative activity in past year and list board members' names, addresses and businesses or professions.

f. *Finances (sec. 4.33)*. Furnish certification by an independent certified public accountant of compliance with an acceptable financial system.

g. *Fund-Raising Practice (sec. 4.34)*. State compliance with all factors.

h. *Annual Report (sec. 4.35)*. Furnish copy of latest annual report.

i. *Financial Reports (sec. 4.36)*. Furnish copy of latest financial report.

j. *Source of Funds and Costs Report (sec. 4.37)*. ★Furnish report in appropriate format as shown in the APPENDIX: Format A for national health agencies, Format B for international service agencies.★

4.5 PUBLIC ANNOUNCEMENT OF RECOGNIZED AGENCIES AND ASSIGNED PERIODS. The Chairman of the Civil Service Commission issues a bulletin in the spring of each year to announce the names of all voluntary agencies recognized for the ensuing fiscal year and to specify the periods assigned for their solicitations within the Federal service. The annual fund-raising bulletin is included in the APPENDIX.

## CAMPAIGN PRACTICES AND PROCEDURES

**5.1 PURPOSE OF AUTHORIZED CAMPAIGNS.** The program for fund raising within the Federal service is in recognition of the importance of voluntary agencies in our free society—agencies which complement and strengthen our tax-supported services in a manner which is vital to the well-being of the American people. Their voluntary services to human needs—in local communities and on the national and international scene—depend upon contributions of funds from the public. And the primary source is employed persons—those with jobs and regular income who recognize a social and civic responsibility to share in helping their fellow man. Solicitation of employees on the job is authorized in the Federal service, as in most other large organizations, in order to assist voluntary agencies in obtaining the funds to continue their worthy programs. Thus, the purpose of our approved campaigns is to familiarize Federal personnel with the human needs that are being met by voluntary programs and to encourage them to contribute a fair amount of the financial support required.

**5.2 TRUE VOLUNTARY GIVING.** True voluntary giving is the free response of an individual to an appeal which gives him full knowledge of the human needs at stake and encourages him to contribute generously in relation to his financial ability and his responsibility as a good citizen.

Before the present program was inaugurated, the lack of official guidelines for the conduct of campaigns had resulted in employee complaints—warranted or unwarranted—about coercion by management personnel to force contributions on an involuntary basis. The President's concern that this not occur forms the basis for the express injunction of Executive Order 10927 that fund-raising arrangements "shall permit true voluntary giving and reserve to the individual the option of disclosing his gift or keeping it confidential." Any practice that involves compulsion, coercion, or reprisal directed to the individual serviceman or civilian employee because of the size of his contribution or his failure to contribute has no place in the

Federal program. Coercive practices debase the spirit and purpose and violate the letter of the Executive Order.

It is incumbent upon the heads of Federal offices and installations to see that management and supervisory personnel and other campaign workers are expressly informed of the President's policy. Negative practices are no substitute for the organized, intensive encouragement of voluntary contributions which is contemplated by the Federal program.

★Employees should be informed that if they believe that in violation of the President's policy they have been subjected to compulsion, coercion or reprisal in connection with a fund-raising appeal for voluntary agencies, they may file a complaint under the agency's grievance procedure or, at their option, they may file a complaint directly with the Civil Service Commission without going through the grievance procedure.★

## 5.3 CAMPAIGN OBJECTIVES

- a. To inform Government people of the essential role that voluntary agencies play in the community and the nation and their need for public support.
- b. To provide an opportunity for every individual to donate to specific worthy agencies for purposes with which he is familiar and which he wants to support.
- c. To seek 100 percent voluntary participation while preserving the individual's right to give or not to give.
- d. To stimulate generous giving in relation to the ability of the giver while preserving his right to give in a confidential manner if he chooses to do so.

## 5.4 ORGANIZATION FOR SOLICITATION

4.1 Management and Employee Organization Support. The importance of meeting human needs through our voluntary agencies and of assisting Federal personnel to discharge their social and civic responsibility without fear of coercion calls for solid understanding, backing and cooperation from all levels of management

and from employee organizations. The head of each Federal installation is responsible for providing local leadership to each authorized campaign by:

- a. Cooperating with voluntary agency representatives and the heads of other Federal agencies in the communitywide effort.
- b. Advance planning and activation of an effective campaign organization in his own installation.
- c. Enlisting the participation and support of employee organization leaders where possible.
- d. Personal endorsement and follow up through messages to all employees and contacts with management and supervisory staff.

.42 *Advance Planning and Organization.* Advance planning and activation of the campaign organization requires:

- a. Selecting a campaign chairman or project officer, division chairmen and keymen who are able and enthusiastic.
- b. Briefing of management staff, campaign workers, and employee organization leaders on the policies of the Federal program and the educational material and administrative details involved in the campaign.
- c. Clear assignment of responsibilities for general publicity, kick-off rallies, indoctrination meetings, and person-to-person solicitation—and for effective supervision, follow up, and progress reporting at each echelon of the campaign organization.

These steps are primary and essential. A detailed guideline for effective campaigning is incorporated in the APPENDIX.

.43 *Keyman Responsibilities.* A keyman is selected for the personal solicitation of about 25 employees, more or less, depending upon the unit organization. He should be chosen for his leadership qualifications, compatibility with co-workers, and motivation toward successful performance. Since he is acting, in effect, as an agent of the recognized voluntary agencies in contacting potential contributors it is important that each keyman be given a thorough briefing on the program and purpose of the participating voluntary agencies, preferably by

representatives of the fund-raising agencies themselves. The keyman's responsibilities are to:

- a. Personally contact each prospective contributor in the assigned group and give him the educational literature and contributor's cards or envelopes appropriate to the campaign.
- b. Explain the services performed by the voluntary agencies and answer any questions about them and the Federal fund-raising program.
- c. Urge a generous gift, with the goal of 100 percent voluntary participation in mind; where appropriate call attention to local fair-share giving guides and arrangements for pledges to be paid on the installment plan.
- d. Collect employee contributions, forward them and make reports in accordance with local arrangements for the particular campaign.
- e. Where authorized in the particular department or agency, collect installment pledges when due.

## 5.5 DOLLAR GOALS, FAIR SHARE GUIDES AND INSTALLMENT PLEDGES

.51 *Dollar Goals or Quotas.* In united fund and community chest campaigns, in coordinated solicitations in nonfederated communities and mixed areas, and in Red Cross campaigns in the domestic area, the local Federal agency head may accept an equitable dollar goal or quota representing his installation's share of the overall dollar goal for the community. When so accepted, the dollar goal for the installation may be allocated in the form of subgoals to principal divisions of the installation. The assignment of a dollar goal or quota to an individual potential contributor is absolutely prohibited. Dollar goals are not authorized in the National Health Agencies and International Service Agencies campaigns in the domestic area nor in any overseas campaigns.

.52 *Fair-Share Giving Guides.* In campaigns which have dollar goals, campaign materials may include what the voluntary agencies consider one's fair share of responsibility toward the success of the campaign. These suggestions are developed by the soliciting agencies for the

giver's guidance and education, and are permissible in the Federal program. However, *there shall be no requirement that individual employees meet such guides when making gifts*, and care should be taken to see that the fair-share guide is not misrepresented as an individual "assessment" or "quota."

**.53 Installment Pledges.** In campaigns which have dollar goals, the voluntary agencies may provide for deferred payment of contributions through installment pledges.

**.531 Employer Collection.** Federal agencies may make provision for keyman collection of installment pledges. Whether this will be done is in the discretion of each Federal department and agency. Discretionary authority may be redelegated to the heads of local installations. An agency undertaking to collect employee pledges may specify (a) the number and timing of periodic installments allowed to an individual contributor, and (b) the keyman collection system to be used. Payment through a payroll deduction system is not authorized.

**.532 Keyman Collection Systems.** The systems used for collection of installment pledges are usually called Keyman A or Keyman B. Keyman A provides for notification of the employees when installations are due and for keyman follow-up and collection of installments. Keyman B provides only for collection stations where installments may be turned in by contributors; it does not involve notification of installments due or keyman follow-up. Under both systems, the follow-up of any delinquent installment payments—and all servicing of confidential gift installment pledges—will be done directly by the voluntary agencies involved.

## 5.6 CONFIDENTIAL CONTRIBUTIONS

**.61 Policy.** The privilege of each Federal contributor to disclose his gift or keep it confidential is mandatory in all campaigns. This right of privacy is safeguarded through the contributor's option to use a sealed envelope in making his donation whether by cash, check or pledge. He need not place his name on the envelope used and it will not be entered by any other person. No effort may be made by any Federal official or employee to determine the amount of a contribution submitted in a confidential manner.

## **.62 Keyman Procedures.**

**.621 Solicitation.** Each potential giver must be given full opportunity to exercise his option to disclose the amount of his gift or keep it confidential. No action which might be coercive or contrary to the principles of true voluntary giving is permitted.

**.622 Collection and Recording.** When a contributor makes his gift by sealed envelope, with or without his name on it, the keyman will preserve the confidentiality of the gift. He will only verify that the contributor's envelope bears the appropriate department or agency identification, and will write it on if necessary, in order to insure its safe transmittal and accountability. Where an individual receipt is called for by campaign procedures, he will furnish the contributor a receipt leaving blank the amount of the gift. The keyman will forward the sealed contributor envelopes in his Keyman Envelope. When sealed envelopes do not bear the contributor's name, the keyman will not list the name on his contributor's list or tally sheet but merely show the number of such anonymous contributions.

**.623 Installment Pledges.** The keyman will not handle the follow-up and collection of installments on pledges which have been made in a confidential manner.

**.63 Reports from Voluntary Agencies.** The feedback reports from voluntary agencies will show the total amount of contributions, including the total in sealed envelopes, for each keyman's contributors list. Voluntary agency reports will not show the amounts of individual contributions.

**5.7 GENERAL PRIVACY OF CONTRIBUTIONS.** The amounts of individual donations will not be made public or revealed to other personnel except in connection with the routine collection and forwarding of contributions and installment pledges from contributors who have chosen not to avail themselves of the confidential envelope procedure. To avoid any possibility of coercive persuasion aimed at the upgrading of an individual's gift, Federal officials or employees will not prepare or utilize for solicitation purposes lists of individuals revealing their previous gifts. Voluntary agencies

will not publicize lists of Federal contributors showing the amounts of their donations.

#### 5.8 RAFFLES, LOTTERIES AND OTHER SPECIAL PROCEDURES PROHIBITED.

The program for fund raising on the job has only one authorized procedure: personal solicitation of each potential contributor by designated keymen. Raffles, lotteries, carnivals, benefits and other special fund-raising procedures are contrary to Federal policy and are prohibited.

#### 5.9 CAMPAIGN MATERIALS

*.91 Furnished by Voluntary Agencies.* All educational material and operational forms and envelopes for Federal campaigns must be furnished by the participating voluntary agencies.

*.92 Provisions for Confidential Giving.*

- a. In community chest, united fund, and Red Cross campaigns, the campaign literature and individual contributor's card (pledge card if used) must notify the contributor of his right and option to enclose his gift and pledge card in a sealed envelope. He may use any envelope for this purpose. The voluntary agencies are not required to

furnish envelopes for individual contributors. ★If the required notice is not contained in the material furnished by the campaign organization,\* Federal agencies should provide this notice by preparing an insert to the materials or arranging for oral instructions by the keymen. The provision involved is an express requirement of E.O. 10927.★

- b. In the National Health Agencies, Joint Crusade, and American Overseas Campaigns, the voluntary agencies will provide an envelope for each potential giver which shall bear on it a request to the contributor to enclose his gift and seal the envelope.

*.93 Recording and Forwarding Contributions.*

The campaign literature should contain instructions to agency campaign chairmen and keymen on the procedures for recording and forwarding contributions. Contributors lists or tally sheets, keyman's envelopes, and campaign report envelopes should bear printed instructions for their use.

★\*This may occur through error or oversight, or in locations where so few Federal employees are involved that it is impractical for the campaign organization to provide a special notice.★

## APPENDIX

- A. AGENCY FUND-RAISING PROGRAM COORDINATORS
- B. FIELD COORDINATING GROUPS
- C. SOURCE OF FUNDS AND COSTS REPORT
- D. CAMPAIGN GUIDELINES FOR VOLUNTARY GIVING
- E. ANNUAL FUND-RAISING BULLETIN
- F. *Nondiscrimination Requirements*
- G. *The Combined Federal Campaign*

# AGENCY FUND-RAISING PROGRAM COORDINATORS

## Agriculture

\*Joseph M. Robertson

## American Battle Monuments Commission

Harvey E. Conway

## Atomic Energy Commission

\*Harry S. Traynor

## Board of Governors, Federal Reserve System

H. F. Sprecher, Jr.

## Bureau of the Budget

\*E. Charles Woods

## Central Intelligence Agency

Emmett D. Echols

## Civil Aeronautics Board

★John W. Dregge★

## Civil Service Commission

David F. Williams

## Commerce

Herbert W. Klotz

## Council of Economic Advisers

★Joseph J. Walka★

## Department of Defense

### Office of the Secretary

\*Everett L. Butler

### Department of the Army

\*Everett L. Butler

Lt. Col. John L. Sullivan

### Department of the Navy

\*★Harold W. Boyles★

\*Cmdr. J. W. Hughes, USN

### Department of the Air Force

\*Benjamin W. Fridge

\*Col. George R. Ashley

## Emergency Planning, Office of

Hubert R. Gallagher

## Export-Import Bank

John R. Crown

## Farm Credit Administration

James E. Pitts, Jr.

## Federal Aviation Agency

\*Robert H. Willey

## Federal Communications Commission

Ben F. Waple

## Federal Deposit Insurance Corporation

Floyd E. Tift

## Federal Home Loan Bank Board

★Charles M. Dulin★

## Federal Mediation & Conciliation Service

Jack R. George

## Federal Power Commission

Milton A. Pilcher

## Federal Trade Commission

John A. Delaney

## Foreign Claims Settlement Commission

★Marion J. Coltrin★

## General Accounting Office

\*John F. Feeney

## General Services Administration

\*John H. Finlator

## Government Printing Office

Harry E. Hull

## Health, Education, and Welfare

\*Rufus E. Miles, Jr.

## Housing and Home Finance Agency

Lewis E. Williams

## Interior

\*George E. Robinson

## Interstate Commerce Commission

Bernard F. Schmid

## Justice

John W. Adler

## Labor

\*Robert K. Salyers

## Library of Congress

Elizabeth W. Ridley

## National Aeronautics and Space Administration

\*Robert J. Lacklen

## National Capital Housing Authority

Donald P. Libera

## National Capital Planning Commission

★Wilmer C. Dutton, Jr.★

## National Capital Transportation Agency

J. Neal Tomey

## National Labor Relations Board

Daniel E. Matthews

## National Mediation Board

Thomas A. Tracy

## National Science Foundation

★George Pilarinos★

## Panama Canal Company

\*Col. W. P. Leber

## Post Office

★Fred Cashman★

## Railroad Retirement Board

Howard W. Habermeyer

## Renegotiation Board

Robert F. Haggerty

## Securities and Exchange Commission

William E. Becker

## Selective Service System

Lt. Gen. Lewis B. Hershey, USA

\*Also member of Fund-Raising Coordinating Group.



## Small Business Administration

Edwin Z. Holland

## Smithsonian Institution

E. L. Roy

## Soldiers' Home

Brig. Gen. John F. Cassidy

## State

William J. Crockett

## Subversive Activities Control Board

Robert K. Thurber

## Tariff Commission

Donn N. Bent

## Tax Court of the United States

O. W. Schoenfelder

## Tennessee Valley Authority

\*John E. Massey

## Treasury

\*Paul McDonald

## U.S. Information Agency

★Lester E. Edmond★

## Veterans Administration

\*A. H. Monk

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\*Also member of Fund-Raising Coordinating Group.

## FIELD COORDINATING GROUPS

The jurisdiction of local Federal coordinating groups ordinarily coincides with the campaign area of the local united fund or community chest. At some locations, coordination extends over a wider area. The designation (CFC) after place names indicates locations where a Combined Federal Campaign was held in fall 1967.

## ALABAMA

*Anniston* (CFC)

Lt. Colonel Edwin F. Patterson, Chairman  
Fund-Raising Program Coordinating Committee  
Headquarters, U.S. Army School/Training Center  
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Asheville, N.C. 28801

*Charlotte*

Mr. George F. Carpenter, President  
Council of Federal Agencies  
Postmaster  
U.S. Post Office and Courthouse  
Charlotte, N.C. 28202

*Durham (CFC)*

Mr. Nelson A. Jackson, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration Hospital  
Fulton Street and Erwin Road  
Durham, N.C. 27705

*Goldsboro*

Lt. William H. Heck, Chairman  
Fund-Raising Program Coordinating Committee  
Headquarters 4th Tactical Fighter Wing (TAC)  
Seymour Johnson Air Force Base, N.C. 27530

*Greensboro*

Mr. John O. Taylor, Chairman  
Fund-Raising Program Coordinating Committee  
U.S. Post Office  
Greensboro, N.C. 27420

*Salisbury*

Dr. H. G. Hockett, Chairman  
Fund-Raising Program, Coordinating Committee  
Veterans Administration Hospital  
Salisbury, N.C. 28144

NORTH DAKOTA

*Grand Forks*

Major Lucien Crowder, Jr., Chairman  
Fund-Raising Program Coordinating Committee  
Headquarters 804th Combat Support Group  
Grand Forks Air Force Base, N. Dak. 58201

*Minot*

Colonel J. E. Upchurch, Chairman  
Fund-Raising Program Coordinating Committee  
Headquarters 810th Strategic Aerospace Division  
(SAC)  
Minot Air Force Base, N. Dak. 58703

OHIO

*Akron*

Mr. William Duke, Chairman  
Fund-Raising Program Coordinating Committee  
U.S. Post Office  
Akron, Ohio 44309

*Canton*

Mr. Paul J. Marks, Chairman  
Fund-Raising Program Coordinating Committee  
U.S. Post Office  
Canton, Ohio 44701

*Chillicothe*

Mr. George J. Trakas, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration Hospital  
Chillicothe, Ohio 45601

*Cincinnati*

Mr. Joseph J. Scanlon, Chairman  
Fund-Raising Program Coordinating Committee  
U.S. Post Office  
Cincinnati, Ohio 45202

*Cleveland (CFC)*

Mr. William R. Blackwell, Chairman  
Fund-Raising Committee  
Cleveland Federal Executive Board  
VA Regional Office  
1240 East Ninth Street  
Cleveland, Ohio 44199

*Columbus*

Mr. R. M. Keane, Chairman  
Fund-Raising Program Coordinating Committee  
Defense Contract Supply Center  
Columbus, Ohio 43215

*Dayton*

Mr. Ray Q. Bumgarner, President  
Federal Executives Association  
Veterans Administration Center  
4100 West Third Street  
Dayton, Ohio 45428

*Newark (CFC)*

Mr. Edward M. LeGendre, Chairman  
Fund-Raising Program Coordinating Committee  
2802d Inertial Guidance and Calibration Group  
Newark Air Force Station  
Newark, Ohio 43055

## OHIO—Continued

*Oberlin*

Mr. George H. Campbell, Chairman  
Fund-Raising Program Coordinating Committee  
Federal Aviation Administration  
326 E. Lorain Street  
Oberlin, Ohio

*Sandusky (CFC)*

Mr. Roy Cooley, Chairman  
Fund-Raising Program Coordinating Committee  
NASA Lewis Research Center  
Plum Brook Station  
Sandusky, Ohio

*Toledo (CFC)*

Mr. Robert P. King, Chairman  
Fund-Raising Program Coordinating Committee  
Social Security Administration  
234 Summit Street  
Toledo, Ohio 43604

*Youngstown (CFC)*

Mr. Chester W. Bailey, Chairman  
Fund-Raising Program Coordinating Committee  
Postmaster  
Youngstown, Ohio 44501

## OKLAHOMA

*Altus*

Colonel Jack H. Heinzl, Chairman  
Fund-Raising Program Coordinating Committee  
Headquarters 11th Strategic Aerospace Wing (SAC)  
Altus Air Force Base, Okla. 73523

*Clinton*

Colonel Robert T. Calhoun, Chairman  
Fund-Raising Program Coordinating Committee  
Headquarters 70th Bombardment Wing (SAC)  
Clinton-Sherman Air Force Base  
Burns Flat, Okla. 73634

*Enid*

Captain Peter Vives, Chairman  
Fund-Raising Program Coordinating Committee  
Headquarters 3575th Pilot Training Wing (ATC)  
Vance Air Force Base, Okla. 73701

*Lawton*

Chairman, Fund-Raising Program Coordinating Committee  
Commanding General  
Army Artillery and Missile Center  
Attn: AKPSIGP-PS  
Fort Sill, Okla. 73503

*Oklahoma City (CFC)*

Colonel William A. Jack, Chairman  
Fund-Raising Program Coordinating Committee  
Oklahoma City Air Materiel Area  
Tinker Air Force Base  
Oklahoma City, Okla. 73145

## OKLAHOMA—Continued

*Tulsa*

Mr. John W. Henderson, Chairman  
Fund-Raising Program Coordinating Committee  
Postmaster  
Tulsa, Oklahoma

## OREGON

*Eugene*

Mr. G. A. Coldeen, President  
Federal Business Association  
Federal Aviation Agency  
Route 1, Box 722  
Eugene, Oreg. 97402

*Portland (CFC)*

Mr. Dan E. Bulfer, President  
Portland Federal Council  
Forest Service Regional Office  
319 S.W. Pine Street  
Portland, Oreg. 97208

*Salem (CFC)*

Mr. E. D. Spencer, Chairman  
Fund-Raising Program Coordinating Committee  
U.S. Post Office  
Salem, Oreg. 97301

## PENNSYLVANIA

*Bucks County (CFC)*

Commander W. C. Moses, Chairman  
Fund-Raising Program Coordinating Committee  
U.S. Naval Air Development Center, Johnsville  
Warminster, Pa. 18974

*Chambersburg (CFC)*

Mr. George E. Danzberger, Chairman  
Fund-Raising Program Coordinating Committee  
Letterkenny Army Depot  
Chambersburg, Pa. 17201

*Coatesville (CFC)*

Dr. Frank F. Merker, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration Hospital  
Coatesville, Pa. 19320

*Greater Harrisburg*

Captain C. E. Fulton, Chairman  
Fund-Raising Program Coordinating Committee  
Naval Supply Depot  
Mechanicsburg, Pa. 17055

*Lebanon (CFC)*

Mr. Charles P. Eberhart, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration Hospital  
Lebanon, Pa. 17042

*Philadelphia*

Captain Paul C. Stimson  
Director of Fund Raising, Planning and Coordinating Committee  
Philadelphia Federal Executive Board  
Fourth Naval District  
Philadelphia, Pa. 19112

PENNSYLVANIA—Continued

*Pittsburgh*

Mr. Alvin R. Guyler, President  
Pittsburgh Federal Executive Association  
VA Regional Office  
1000 Liberty Ave.  
Pittsburgh, Pa. 15222

*Tobyhanna (CFC)*

Colonel E. C. Holland, Chairman  
Fund-Raising Program Coordinating Committee  
Headquarters, Tobyhanna Army Depot  
Tobyhanna, Pa. 18466

*Wilkes-Barre (CFC)*

Dr. Leon Ross, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration Hospital  
1111 East End Boulevard  
Wilkes-Barre, Pa. 18703

RHODE ISLAND

*Newport*

Mr. Harry Kizirian, Chairman  
Federal Executive Council  
U.S. Post Office  
Providence, R.I. 02904

SOUTH CAROLINA

*Charleston (CFC)*

Chairman, Fund-Raising Program Coordinating Committee  
Commandant, Sixth Naval District  
Attn: Deputy Chief of Staff for Naval Base  
U.S. Naval Base  
Charleston, S.C. 29408

*Columbia (CFC)*

Dr. Karl M. Lippert, President  
Federal Executive Council  
Veterans Administration Hospital  
Columbia, S.C. 29201

*Greenville*

Mr. R. A. Jolley, Vice President  
Greenville Federal Executive Association  
Postmaster  
Greenville, S.C. 29601

SOUTH DAKOTA

*Hot Springs-Rapid City (CFC)*

Colonel Robert W. Kelley, President  
Federal Business Association  
Selective Service System  
Box 1872  
Rapid City, S. Dak. 57701

*Sioux Falls (CFC)*

Mr. Donald Cowley, President  
Federal Executive Association  
Veterans Administrative Center  
2501 W. 22nd Street  
Sioux Falls, S. Dak. 57101

TENNESSEE

*Chattanooga*

Mr. Charles C. Miller, Chairman  
Fund-Raising Program Coordinating Committee  
Tennessee Valley Authority  
Chattanooga, Tenn. 37401

*Knoxville*

Mr. Robert H. Collier, Chairman  
Fund-Raising Program Coordinating Committee  
Tennessee Valley Authority  
Knoxville, Tenn. 37902

*Memphis (CFC)*

Rear Admiral Ernest Christenson, Chairman  
Fund-Raising Program Coordinating Committee  
Chief of Naval Air Technical Training  
U.S. Naval Air Station (75)  
Memphis, Tenn. 37115

*Nashville (CFC)*

Mr. G. Reid Bethurum, President  
Nashville Federal Business Association  
P.O. Box 1070  
Nashville, Tenn. 37202

*Oak Ridge (CFC)*

Mr. S. R. Sapirie, Chairman  
Fund-Raising Program Coordinating Committee  
U.S. Atomic Energy Commission  
Oak Ridge, Tenn. 37830

TEXAS

*Abilene (CFC)*

Mr. Clyde E. Grant, Chairman  
Fund-Raising Program Coordinating Committee  
Postmaster  
Abilene, Tex. 79604

*Amarillo*

Colonel M. J. McKeever, Jr. Chairman  
Fund-Raising Program Coordinating Committee  
Amarillo Technical Training Center (ATC)  
Amarillo Air Force Base, Tex. 79111

*Big Spring*

Colonel George E. Franks, Chairman  
Fund-Raising Program Coordinating Committee  
Headquarters 3560th Pilot Training Wing (ATC)  
Webb Air Force Base, Tex. 79720

*Corpus Christi (CFC)*

Rear Admiral R. A. Macpherson, Chairman  
Fund-Raising Program Coordinating Committee  
U.S. Naval Air Station  
Corpus Christi, Tex. 78419

*Dallas-Fort Worth*

Mr. Elmer P. Davis, Chairman  
Dallas-Fort Worth Federal Executive Board  
National Labor Relations Board  
110 W. 5th Street, Meachum Bldg.  
Fort Worth, Tex. 76016

## TEXAS—Continued

*Del Rio (CFC)*

Mr. Hubert H. Anderson, Chairman  
Val Verde County Fund-Raising Program Coordinating  
Committee  
Laughlin Air Force Base, Tex. 78840

*El Paso (CFC)*

Mr. James Kaster, Chairman  
Fund-Raising Program Coordinating Committee  
Postmaster  
El Paso, Tex. 79951

*Galveston*

Mr. N. A. Nilson, Chairman  
Fund-Raising Program Coordinating Committee  
Galveston District Corps of Engineers  
P.O. Box 1229  
Galveston, Tex. 77550

*Houston*

Mr. Claude McLarty, President  
Houston Federal Business Association  
General Services Administration  
515 Rusk Ave.  
Houston, Tex. 77002

*Kerrville (CFC)*

Mr. John B. Byrd, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration Hospital  
Kerrville, Tex. 78028

*Lubbock*

Colonel Ernest T. Cragg, Chairman  
Fund-Raising Program Coordinating Committee  
3500th Pilot Training Wing  
Reese Air Force Base, Tex. 79401

*San Antonio (CFC)*

Major General Laurence A. Potter, Jr., Chairman  
Fund-Raising Program Coordinating Committee  
Brooke Army Medical Center  
Fort Sam Houston, Tex. 78234

*Texarkana*

Mr. Bobby J. Brewer, Chairman  
Fund-Raising Program Coordinating Committee  
Red River Army Depot  
Texarkana, Tex. 75502

*Waco*

Dr. George T. McMahan, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration Hospital  
Memorial Drive  
Waco, Tex. 76703

*Wichita Falls*

Colonel Charles W. Johnstone, Chairman  
Fund-Raising Program Coordinating Committee  
Sheppard Technical Training Center  
Sheppard Air Force Base, Tex. 76311

## UTAH

*Ogden (CFC)*

Colonel Robert B. Ladd, Chairman  
Fund-Raising Program Coordinating Committee  
Defense Depot Ogden  
Ogden, Utah 84404

*Provo (CFC)*

Mr. Robert Q. Strong, Chairman  
Fund-Raising Program Coordinating Committee  
Postmaster  
Provo, Utah 84601

*Salt Lake City (CFC)*

Mr. L. C. Romney, President  
Federal Executives Association for Utah  
Federal Housing Administration  
P.O. Box 11009  
Salt Lake City, Utah 84111

## VIRGINIA

*Newport News-Hampton*

Colonel J. W. Patchin, Chairman  
Fund-Raising Program Coordinating Committee  
USA Transportation Center  
Fort Eustis, Va. 23604

*Norfolk (CFC)*

Rear Admiral J. C. Dempsey, Chairman  
Fund-Raising Program Coordinating Committee  
Commandant, Fifth Naval District  
Norfolk, Va. 23511

*Richmond (CFC)*

Mr. R. L. Lancaster, Cochairman  
Fund-Raising Program Coordinating Committee  
Assistant Postmaster  
10th and Main Streets  
Richmond, Va. 23219

*Roanoke (CFC)*

Mr. C. W. Nixon, President  
Federal Executives Association  
Veterans Administration Regional Office  
211 West Campbell Avenue  
Roanoke, Va. 24011

## WASHINGTON

*Bremerton (CFC)*

Mr. Robert H. Britten, Chairman  
Fund-Raising Program Coordinating Committee  
Puget Sound Naval Shipyard  
Bremerton, Wash. 98314

*Seattle (CFC)*

Mr. Sidney Laurens, Chairman  
Seattle Federal Executive Board  
Social Security Administration  
230 Fairview Avenue  
Seattle, Wash. 98109

WASHINGTON—Continued

*Spokane (CFC)*

Mr. Roy G. McElroy, President  
Spokane Federal Executives Association  
Federal Aviation Administration  
Rapcon, P.O. Box 1307  
Fairchild Air Force Base, Wash. 99011

*Tacoma*

Colonel James M. Butler, President  
Tacoma Federal Executive Association  
c/o Base Dental Services  
325th Fighter Wing  
McChord Air Force Base  
Tacoma, Wash. 98438

*Vancouver (CFC)*

Dr. J. Andrew Hall, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration Hospital  
Vancouver, Wash. 98663

*Walla Walla (CFC)*

Mr. James W. Catto, Chairman  
Fund-Raising Program Coordinating Committee  
Bonneville Power Administration  
P.O. Box 1518  
Walla Walla, Wash. 99362

WEST VIRGINIA

*Charleston*

Mr. J. Raymond DePaulo, Chairman  
Federal Executive Council  
Department of Commerce, Room 3002  
U.S. Federal Building and Courthouse  
Charleston, W. Va. 25301

*Huntington (CFC)*

Mr. Merrill W. Fox, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration  
502 8th St.  
Huntington, W. Va. 25701

*Martinsburg (CFC)*

Mr. A. A. Gavazzi, Chairman  
Fund-Raising Program Coordinating Committee  
Veterans Administration Center  
Martinsburg, W. Va. 25401

*Parkersburg*

Mr. Frank Armfield, Chairman  
Fund-Raising Program Coordinating Committee  
Bureau of Public Debt  
214 Seventh Street  
Parkersburg, W. Va. 26101

WISCONSIN

*Madison*

Mr. John Whitmore, Chairman  
Fund-Raising Program Coordinating Committee  
Postmaster  
Madison, Wisconsin

*Milwaukee*

Mr. Stanley J. Cybulski, President  
Federal Officials Association  
Postmaster  
U.S. Post Office  
Milwaukee, Wis. 53202

WYOMING

*Cheyenne (CFC)*

Mr. Richard L. Hutt, President  
Cheyenne Federal Executive Council  
Internal Revenue Service  
308 W. 21st St.  
Cheyenne, Wyo. 82001

COMMONWEALTH OF PUERTO RICO

*San Juan*

Mr. David M. Rayner, President  
Federal Business Association  
Internal Revenue Service  
255 Ponce de Leon Ave., 4th Floor  
Fort Buchanan, P.R. 00917

NATIONAL CAPITAL AREA

*Washington, D.C. (CFC)*

Mr. Nicholas J. Oganovic, Chairman  
Fund-Raising Program Coordinating Committee  
U.S. Civil Service Commission  
Washington, D.C. 20415

PANAMA

*Panama Canal Zone (CFC)*

Colonel Harold R. Parfitt, Chairman  
Fund-Raising Program Coordinating Committee  
Canal Zone Government  
Balboa Heights, C.Z.

OVERSEAS AREAS

*Department of Defense (CFC)*

Mr. Charles V. Brewer, Chairman  
National Policy Coordinating Committee  
DoD Overseas Combined Federal Campaign  
Office of the Assistant Secretary of Defense  
(Administration)  
Washington, D.C. 20301

★*Format A*—For use by National Health Agencies. In preparing this report, applicant should use the definitions of income and expense classifications contained in the National Health Council's *Accounting and Financial Reporting Procedures Guide*.

(Agency)

SOURCE OF FUNDS AND COSTS REPORT  
For the Year ending \_\_\_\_\_ (date)

	Amount	Percent of Income
	\$	%
INCOME		
CONTRIBUTIONS.....		%
(1) United funds and/or community chests.....		%
(2) Federal service campaigns.....		%
(3) Other contributions.....		%
SPECIAL EVENTS (less related expenses of \$.....)		%
SERVICE FEES, LITERATURE SALES, ETC.....		%
GAIN FROM THE SALE OF PRODUCTS.....		%
MEMBERSHIPS.....		%
INVESTMENT INCOME.....		%
OTHER INCOME.....		%
	_____	_____
TOTAL INCOME.....	\$	100%

	Amount	Percent of Expenditures
	\$	%
EXPENSES		
RESEARCH.....		%
PUBLIC HEALTH EDUCATION.....		%
PROFESSIONAL EDUCATION AND TRAINING.....		%
PATIENT SERVICES.....		%
COMMUNITY SERVICES.....		%
Program Expenditures (Subtotal).....	\$ _____	%
PUBLIC INFORMATION.....		%
FUND RAISING.....		%
FIELD STUDIES AND REORGANIZATION.....		%
ADMINISTRATIVE AND GENERAL EXPENSES.....		%
Non-Program Expenditures (Subtotal).....	\$ _____	%
	_____	_____
TOTAL EXPENSES.....	\$	100%★

★*Format B*—For use of International Service Agencies In preparing this report, the applicant agency should list program expenditures in functional categories appropriate to the nature of its program operations.

(Agency) \_\_\_\_\_

### SOURCE OF FUNDS AND COSTS REPORT

For the Year ending \_\_\_\_\_ (date)

#### INCOME

	Amount	Percent of Income
CONTRIBUTIONS.....	\$	%
(1) United funds and/or community chests.....		%
(2) Federal Service campaigns.....		%
(3) Other contributions.....		%
SPECIAL EVENTS (less related expenses of \$ _____)		%
SERVICE FEES, LITERATURE SALES, ETC.....		%
GAIN FROM THE SALE OF PRODUCTS.....		%
OTHER INCOME.....		
 TOTAL INCOME.....	 \$	 100%

#### EXPENSES

	Amount	Percent of Expenditures
PROGRAM FUNCTIONS (Itemize)		
.....	\$	%
.....	\$	%
.....	\$	%
Etc.....		
Program Expenditures (Subtotal).....	\$	%
PUBLIC INFORMATION.....		%
FUND RAISING.....		%
ADMINISTRATIVE AND GENERAL EXPENSES.....		%
Non-Program Expenditures (Subtotal).....	\$	%
 TOTAL EXPENSES.....	 \$	 100%★



## CAMPAIGN GUIDELINES FOR VOLUNTARY GIVING

The policies for fund-raising in the Federal service recognize the importance of voluntary agencies in our American way of life and the opportunity that is given employees to know about them and to give generously toward their support. At the same time, and as has been set forth in Executive Order 10927, these policies stress the importance of true voluntary giving and establish certain individual safeguards such as the option of disclosing one's gift or keeping it confidential by the use of a sealed envelope and the prohibition against assigning a special dollar goal or quota to an individual.

Any successful fund drive requires an enthusiastic campaign. But administrative and campaign officials, supervisors and keymen must be familiar with all of the provisions of the Federal program in order to know where to draw the line between proper and improper methods.

It is approved practice for management officials to call employees together, explain the need for and use of the funds being solicited and urge employees to give generously—as much as they can afford. Where there are dollar goals for the campaign, the distribution of a "fair-share" guide based on employee pay levels is also approved practice, and the guide generally is welcomed by employees as an indication of what amount might be a fair contribution. Difficulty arises if the suggested contributions outlined on fair-share guides are confused or interpreted as "quotas." Even though two are in the same salary bracket, it does not necessarily follow that they are either able or inclined to make the same contribution. Some give considerably more—others less.

There is no place in the Federal fund-raising program for force or coercion. Campaigns should and must be conducted through an intensive program of employee information about the needs for and use of the funds to be solicited and by a strong appeal for contributions based on the contributor's knowledge of the needs and his ability and willingness to give voluntarily. In the final analysis, each employee must be the sole judge of what he can and will contribute and whether or not he wishes to keep the amount of his contribution confidential.

### PLEASE STUDY AND APPLY THE FOLLOWING SUGGESTIONS:

- I. *Agency or Installation Heads, Campaign Vice Chairmen, and Division Campaign chairmen*
  - A. Familiarize yourself personally with:
    1. the fundamentals of the Federal fund-raising program and its policies, and

2. the approved campaigns and the work of the participating private agencies.
- B. Upon receipt of the President's Message on each campaign, plus that from the head of your department or agency, see that they are in the hands of every employee well in advance of the solicitation for funds.
- C. Activate your agency's regular fund-raising organization right down to the last keyman. Carefully select project personnel and keymen who are interested, able and enthusiastic.
- D. Arrange training sessions for all campaign leaders before the beginning of the campaign so that they know the program needs of the agencies—the basic philosophy behind the Federal plan—the campaign mechanics.
- E. Put out a personal memorandum to all employees urging them to familiarize themselves with the private agencies and their programs and to contribute as generously as possible.
- F. Make use of all public information channels and materials available to you so that each individual giver will understand the work of each agency involved and for what purpose he is contributing. This should include informational bulletins, bulletin board posters, house organs, showing of agency campaign films to all employees. Use the Press Kit material before and during drive. Work up special material based on eye-witness accounts of work of these agencies. Publish weekly progress reports.
- G. Have a kick-off rally for campaign workers at the department, bureau or installation level at least one week before the opening of the campaign. Use key speakers and audio-visual materials.
- H. Set a schedule of employee information meetings or rallies so that every employee is thoroughly briefed on the objectives, benefits and needs of the private agencies in the campaign. Promote well-planned enthusiastic meetings within entire office divisions and units, using division heads, top supervisors and employee organization leaders.
- I. In campaigns which have dollar goals, let everyone know what installation and division goals have been set and furnish them a "fair share" giver's guide for their information when appropriate.
- J. Issue fact sheets to all keymen regarding work of the agencies participating in the particular campaign so that they may explain the program and services of the benefiting agencies.

- K. Make it clear that the campaign is important official government business and not an informal duty to be shrugged off. Remember that this is a social and civic responsibility—human needs are at stake and can be met only if most people give generously.
- L. Encourage keymen to approach each employee individually and to make follow-up contact until the employee contributes or indicates that he does not wish to participate.
- M. Discourage contacts with individual givers by other than designated keymen. Management officials or supervisors should always talk to givers in groups and never put an individual "on the spot".
- N. Instruct campaign workers to avoid coercive pressure. If the keyman is interested and well-indoctrinated he can transmit this interest and enthusiasm to those he solicits. The same is true of campaign officials who brief the keyman.
- O. Start the campaign on time. Push it to an early conclusion. This will save staff time and lead to a better campaign.
- P. Ask for weekly or biweekly progress reports and have coordinators to assure that the campaign remains active throughout the full period, if necessary to complete solicitation.
- Q. Prepare a thermometer or other type chart for public display showing the progress of the campaign on a daily or weekly basis for each of the major campaign units.
- R. Report final results to employees and make sure senior officials write "thank-you" letters to all those helping them in the campaign. Outstanding performance merits official commendation in fund raising as it would in other official activities.
- S. Survey a sampling of employees for their evaluation of the conduct of the campaign.

As needed, act on the suggestions in planning the next campaign.

## II. Keymen

- A. Plan solicitation carefully. Begin it at the strategic time for your unit—after an inspirational meeting—on a pay day. (Concentrating on pay days when collecting is sound if cash gifts are appropriate.) Allow plenty of time for call-backs to follow up on those who are missed on the first go-around.
- B. Contact everyone individually. Issue all appropriate educational and contributors' materials. Try to avoid more than one complete solicitation. The irritation caused by asking the same person a second or third time for his contribution can imply coercive pressure, can do harm to subsequent campaigns and should be avoided.
- C. Stress 100 percent participation. Nobody has to give but almost everyone will want to give. Make the campaign a family affair with joint responsibility extending to the smallest giver.
- D. Appeal to the employee's best instincts for giving and urge a generous gift. When appropriate, encourage installment giving as this will help the contributor to give as generously as he wishes toward the needs of many agencies. When urging a generous gift, tell each employee:
  1. His gift will support many avenues of voluntary agency effort in the community and the Nation.
  2. He should designate his contribution to the agencies of his greatest interest.
  3. His contribution should bear direct relationship to the luxury items he is so fortunate to have.
  4. Only one appeal will be made for these agencies this year.
  5. His gift counts.

## ★1968-69 FUND-RAISING BULLETIN

*To the Heads of Executive Departments and Agencies*

The voluntary agencies recognized by the Chairman of the Civil Service Commission, in accordance with Executive Order 10927, for on-the-job solicitation privileges in the Federal service during fiscal year 1969 are listed in this bulletin. Their worthwhile efforts on behalf of all Americans merit a generous voluntary contribution from Federal personnel. The Eligibility Committee has determined that each one meets established requirements as to program objective, administrative integrity, and financial responsibility.

The assigned periods for the 1968-69 campaigns and the locations and conditions under which solicitation privileges may be exercised are as specified in section 3.5 of the Federal fund-raising manual, except as modified by the instructions in Appendix F, NON-DISCRIMINATION REQUIREMENTS, and Appendix G, THE COMBINED FEDERAL CAMPAIGN.

## RECOGNIZED CAMPAIGNS AND AGENCIES

1. LOCAL COMMUNITY CHESTS, UNITED FUNDS, AND OTHER FEDERATED GROUPS which are members in good standing of, or are recognized by, the United Community Funds and Councils of America, Inc.
2. THE AMERICAN NATIONAL RED CROSS  
(Domestic and overseas areas)
3. FEDERAL SERVICE CAMPAIGN FOR THE NATIONAL HEALTH AGENCIES  
(Domestic and overseas areas)  
American Cancer Society, Inc.  
American Heart Association, Inc.

## Arthritis Foundation

Muscular Dystrophy Associations of America, Inc.  
National Association for Mental Health, Inc.  
National Association for Retarded Children, Inc.  
National Cystic Fibrosis Research Foundation  
National Foundation-March of Dimes  
National Multiple Sclerosis Society  
National Society for Crippled Children and Adults, Inc.  
National Society for the Prevention of Blindness  
United Cerebral Palsy Associations, Inc.

4. INTERNATIONAL SERVICE AGENCIES  
(Domestic area only)

American-Korean Foundation, Inc.  
CARE, Inc.

★PLANNED PARENTHOOD-WORLD POPULATION★  
Project HOPE (People-to-People Health Foundation, Inc.)

5. INTERNATIONAL SERVICE AGENCIES  
(Overseas area only)

American-Korean Foundation, Inc.  
American Social Health Association  
CARE, Inc.  
International Social Service, Inc.  
National Park and Recreation Association

★PLANNED PARENTHOOD-WORLD POPULATION★  
Project HOPE (People-to-People Health Foundation, Inc.)  
United Seamen's Service, Inc.  
United Service Organizations, Inc. (USO)

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**NOTE**

**NONDISCRIMINATION REQUIREMENTS****I. STATEMENT BY THE CHAIRMAN OF THE U.S. CIVIL SERVICE COMMISSION**

Voluntary health and welfare agencies financed by contributions from the general public play a vital part in maintaining the well-being of the American people. In recognition of the importance of their unique role in our society, Government agencies annually solicit voluntary contributions from Federal employees and members of the Armed Forces to assist in providing the financial support they require. Contributions on the order of \$25,000,000 a year are made to local united funds and community chests and to the American Red Cross and other national voluntary agencies that meet the eligibility standards for participation in Federal fund-raising campaigns.

The great majority of voluntary health and welfare agencies serve all citizens without racial discrimination. Unfortunately, this practice is not universal. In some communities our Negro citizens are excluded from participation in health, welfare and recreational services that are available to all others who are in need, or they are provided inferior services on a segregated basis. This circumstance works against many who are already disadvantaged and tends to perpetuate in our society the very conditions that humanitarian services are designed to eliminate.

President Johnson has taken action, as did President Kennedy before him, to secure the right of all citizens to the full and equal enjoyment of services and facilities of a public nature and has appealed to private organizations and individuals to help extend the principle of equal opportunity throughout American life. Our national policy is clear, and I can no longer in good conscience recommend to Federal employees, who themselves work under conditions of equal privilege and opportunity, that they continue to participate in the financial support of health and welfare services which are conducted on a racially discriminatory or segregated basis. Nor can Government agencies properly continue to use official time and manpower to conduct on-the-job solicitations on behalf of health and welfare agencies which persist in these practices. Therefore, in the exercise of my responsibility under Executive Order 10927 and with the unanimous concurrence of the Federal Fund-Raising Advisory Council of voluntary agency leaders I have determined that fund-raising privileges in the Federal establishment must hereafter be limited to agencies which follow a policy and practice of nondiscrimination.

This decision takes into consideration the fact that voluntary agencies which currently do not meet this standard are free to choose whether they wish to maintain their present policies without change, or—and I sincerely hope that all will choose the latter course—to amend their policies in the spirit of our democracy and join with the majority of their associates in practices which merit the continued support of Federal employees and members of the Armed Forces. In order that such agencies may have a reasonable opportunity

to consider a change in governing policies, the non-discrimination requirement will be effective for Federal fund-raising campaigns beginning after July 1, 1965.

**II. NONDISCRIMINATION STANDARD**

Voluntary agencies recognized for fund-raising privileges within the Federal service must operate without racial discrimination. This policy applies to persons served by the agencies, to the staffs of the agencies and to membership on their governing boards. Operating without racial discrimination means that:

1. No person is excluded from service because of race.
2. There is no segregation of those served on the basis of race.
3. There is no discrimination on the basis of race in hiring, assignment, promotion or other conditions of staff employment.★In addition, the agency has a plan for positive action to achieve equal employment opportunity for all persons in the filling of its staff positions including elements such as contacts with various organizations in the community, including minority group organizations, regarding the agency's employment needs, recruitment advertisements in minority group news media where advertising in the general media is used to fill jobs, identifying the agency as an equal employment opportunity employer in recruitment advertisements and the use for job referral purposes of only those employment agencies which do not discriminate on the basis of race in making referrals.★
4. There is no discrimination on the basis of race in membership on the agency's governing body.

**III. VOLUNTARY AGENCIES AFFECTED**

Every national or local voluntary health, welfare or recreational agency which, after July 1, 1965, solicits contributions from Federal employees or members of the Armed Forces at place of employment or duty station must first provide satisfactory assurance that it follows a policy and practice of racial nondiscrimination. This requirement is applicable to:

1. A local united fund, community chest or other federated fund-raising organization which is authorized solicitation privileges under the provisions of Manual section 3.55, and each participating member agency;
2. Each member agency of a coordinated solicitation which is authorized solicitation privileges under the provisions of Manual section 3.56;
3. The national office and each state or local chapter of a national voluntary agency which is authorized on-the-job solicitation privileges under the provisions of Manual section 3.57;
4. Each national or local voluntary agency which is authorized solicitation privileges in the overseas area under the provisions of Manual section 3.58; and
5. Each voluntary agency which is authorized off-

the-job solicitation privileges under the provisions of Manual section 3.6.

#### IV. ASSURANCE REQUIRED

A. *Form of assurance.* Assurance of racial nondiscrimination shall be in writing and shall consist of:

1. A statement of policy by the agency's governing board (national or local board, as appropriate) covering the elements of racial nondiscrimination listed in the standard, and
2. A certification that the agency's practices in fact conform with the standard.

Policy statements and certifications shall be sufficiently explicit to assure that the four elements of racial nondiscrimination listed in the standard are met. No standard form or format is required.

#### B. *Filing procedure*

1. *National level.* A national voluntary agency which is required by the provisions of Manual section 4.4 to file application annually for independent solicitation privileges shall file with the Office of the Chairman, Civil Service Commission, by March 1, satisfactory assurance with respect to the policy and practice of its national organization.

A national voluntary agency whose national policy is binding upon all local chapters, committees or other units which act for the agency may also file at the national level assurance of nondiscrimination practice on the part of such local units.

2. *Local level.*

- a. *United funds and chests.* A local united fund, community chest or other federated fund-raising organization shall advise its member agencies of the nondiscrimination requirements and request each agency to furnish assurance of racial nondiscrimination in the form prescribed in A above. It shall receive such assurances and forward them in a group, with the policy statement and certification of the federated fund-raising organization itself, to the appropriate Federal official in its local campaign area by July 1, 1965.

- b. *National Agencies certified by the National Budget and Consultation Committee.* To facilitate the provision of assurances and to avoid excessive duplication, the Chairman of the Commission has authorized the National Budget and Consultation Committee, 820 Second Avenue, New York, N.Y., to serve as the approving agency and official repository for nondiscrimination assurances by the national organizations of certain voluntary agencies whose budgets, programs and support plans are reviewed by NBCC. Certification in the NBCC Reports for 1966 that satisfactory assurance is on file with NBCC shall be considered satisfactory evidence by local funds and chests and Federal officials of compliance with

the assurance requirement by the national organization of the agency certified.<sup>2</sup>

NBCC certification applies only in circumstances where the national organization of the agency receives support directly as a participating member of the local united fund, chest or local coordinated solicitation. It does not apply if the participating member is a state or local unit of the national agency, since, in such case, assurance is required from the participating state or local unit.

- c. *American Red Cross.* The Red Cross has furnished the Chairman of the Civil Service Commission satisfactory assurance of nondiscrimination policy and practice with respect to its national organization and all local units. Accordingly, local Red Cross chapters and units are exempted from the requirement of filing assurances with local Federal officials.

- d. *National health agencies.* Each recognized national health agency, as listed in Appendix E, has furnished the Chairman of the Civil Service Commission satisfactory assurance of nondiscrimination policy and practice with respect to its national organization.

A state or local chapter or affiliate of a recognized national health agency which is otherwise eligible to participate in the Federal Service Campaign for the National

<sup>2</sup> The following national voluntary agencies have filed satisfactory nondiscrimination assurances for their national organizations and have been certified to local united funds and chests in NBCC 1966 Reports:

American Hearing Society  
American Social Health Association  
Arthritis Foundation  
Big Brothers of America  
Camp Fire Girls, Inc.  
Child Welfare League of America, Inc.  
Commission on Social Welfare, National Council of the Churches of Christ in the U.S.A.  
Council on Social Work Education  
Department of Public Health Nursing, National League for Nursing  
Family Service Association of America  
Florence Crittenton Association of America, Inc.  
International Social Service, American Branch, Inc.  
Jackson Laboratory  
National Association for Mental Health, Inc.  
National Association for Retarded Children, Inc.  
National Committee on Employment of Youth of the National Child Labor Committee  
National Conference on Social Welfare  
National Council on Alcoholism, Inc.  
National Council on Crime and Delinquency  
National Federation of Settlements and Neighborhood Centers  
National Legal Aid and Defender Association  
National Recreation Association  
National Social Welfare Assembly, Inc.  
National Travelers Aid Association  
National Urban League, Inc.  
United Cerebral Palsy Associations, Inc.  
United Community Funds and Councils of America  
United Seamen's Service  
United Service Organizations, Inc.

Health Agencies shall provide nondiscrimination assurance to the appropriate FSCNHA State Coordinating Committee. The FSCNHA State Coordinating Committee shall forward in a group to the appropriate Federal official in each campaign location (county) the nondiscrimination assurances of the state or local chapters or affiliates which are otherwise eligible to participate in the FSCNHA campaign at that location.

e. *International service agencies.* American-Korean Foundation, CARE, Project HOPE and Radio Free Europe have furnished the Chairman of the Civil Service Commission satisfactory assurance of nondiscrimination policy and practice with respect to their national organizations and all local chapters, committees and other units. Accordingly, local units of these national voluntary agencies are exempted from the requirement of filing assurances with local Federal officials.

f. *Recipient of assurances filed locally.* Nondiscrimination assurances required to be filed at the local level shall be filed with the chairman of the appropriate local Federal coordinating group, as listed in Appendix B, or in the absence of such organization in the local area, with the head of the local Federal installation having the largest number of civilian and military personnel.

C. *No further assurance required.* A national or local voluntary agency which has filed satisfactory nondiscrimination assurance for the fiscal year beginning July 1, 1965, and has maintained such nondiscriminatory policy or practice without substantial change is not required to file further assurance to continue its eligibility for subsequent years unless such further assurance is expressly requested by the appropriate Federal official.

#### V. ADMINISTRATION BY THE FEDERAL GOVERNMENT

A. *Responsibility for administration.* The responsibility for administration of the nondiscrimination requirements at the national level is assigned to the Office of the Chairman, Civil Service Commission.

At the local level, each local Federal coordinating group is authorized and responsible for administration of the nondiscrimination requirements in its local area. In the absence of such an organization in the local area (county), the authority and responsibility is assigned to the head of the local Federal installation having the largest number of civilian and military personnel. At their discretion, a local Federal coordinating group may redelegate to an appropriate committee, or the head of a designated local Federal installation may redelegate to a subordinate official, such of the authority assigned in this section as is deemed appropriate.

After July 1, 1965, the heads of Federal offices and installations shall permit the solicitation of employees or military personnel on the job, or "off-the-job" as defined in Manual section 3.6, only on behalf of such voluntary agencies as have been determined by the responsible Federal coordinating group or official to be qualified under the nondiscrimination standard and related requirements. The nondiscrimination requirements do not apply, of course, to solicitations of Federal personnel at their homes or otherwise in their capacity as private citizens away from their place of employment or duty stations.

B. *Acceptance of nondiscrimination assurances.* The appropriate Federal official in each local area, as designated above, will review nondiscrimination assurances filed with him to determine that they meet the requirements. He will request such additions or amendments as may be needed. He will notify the heads of all local Federal offices and installations of his finding with respect to the receipt of satisfactory non-discrimination assurances from all voluntary agencies which are otherwise eligible to solicit contributions from Federal personnel in the local area. Assurances will be retained as official records in the custody of his office. The responsible local Federal official may request interpretation or advice from the Office of the Chairman, Civil Service Commission, as needed.

C. *Disqualifications.* If a required nondiscrimination assurance is not filed with the appropriate Federal official, or is filed but is determined by him to be unsatisfactory, the voluntary agency concerned shall not be permitted to solicit contributions from Federal personnel in the local area until satisfactory assurance is received.

In the event a voluntary agency files satisfactory assurance but information is received which raises a substantial question whether the agency's practices in fact meet the standard, the appropriate Federal official shall make such investigation as may be necessary and, after providing the agency an opportunity to present evidence of satisfactory compliance, shall make a determination whether Federal fund-raising privileges in the local area will be granted or withheld from the agency. If a substantial question regarding nondiscrimination practices is raised with respect to a voluntary agency which furnished its assurance to the Civil Service Commission or the National Budget and Consultation Committee, the appropriate Federal official will forward the question and all available related information to the Office of the Chairman, Civil Service Commission, for investigation.

If a local united fund, community chest or other federated organization does not itself file the required nondiscrimination assurance, the federated organization shall not be permitted to solicit contributions from Federal personnel in the local area until satisfactory assurance is received. In such event the local area becomes a nonfederated community for purposes of Federal fund raising. Member agencies of the federated organization which individually have met the nondiscrimination requirement will not be allowed to

solicit independently. However, they may organize a coordinated solicitation in accordance with the provisions of Manual section 3.56.

If a local united fund, community chest or other federated organization furnishes satisfactory assurance for its own organization, the fact that one or more of its member agencies has not met the nondiscrimination requirements does not cancel the federated organization's Federal fund-raising privileges in the local area. It may conduct a solicitation in the Federal service on behalf of those member agencies which have met the requirements. However, nonqualifying agencies shall not be listed in the solicitation literature distributed in Federal offices and installations and shall not participate in nor benefit, directly or indirectly, from contributions received in the Federal solicitation. If the federated organization conducts a solicitation in

the general community which includes nonqualifying agencies, it will be necessary to treat receipts from the Federal solicitation as donor-restricted funds, separate and distinct from the funds received from other contributors, so as to insure that nonqualifying agencies do not benefit directly or indirectly from the Federal solicitation, as follows:

1. Funds from the Federal solicitation shall be identified separately from other funds in the organization's financial records and shall be allocated only to agencies which participated in the Federal solicitation; and
2. Funds from non-Federal sources shall be allocated in a separate process and the proportionate shares assigned to nonqualifying agencies shall not be increased to offset losses due to their disqualification for the Federal solicitation.



APPENDIX G

## THE COMBINED FEDERAL CAMPAIGN

### I. PURPOSE

These arrangements for local combined Federal campaigns for voluntary health and welfare agencies have been established in order to:

1. Meet employee wishes for a single campaign,
2. Reduce costs to the Government, and
3. Increase contributions to voluntary health and welfare.

They have been approved by the Chairman of the Civil Service Commission under the authority of Executive Order 10927, dated March 18, 1961, which governs fund raising within the Federal Service.

### II. BACKGROUND

Federal employees and members of the Armed Forces contribute over twenty million dollars a year for charitable purposes in response to fund-raising appeals on the job. Their contributions go to four broad categories of voluntary agencies:

Local united funds and community chests, on behalf of local and national health, welfare and recreational services including such agencies as the Boy Scouts and Salvation Army;  
The American Red Cross;  
National health agencies like the American Cancer Society and American Heart Association;  
International service agencies like CARE and Radio Free Europe.

Since 1956 the arrangements for these groups have involved two or three separate drives on the job each year: The local united fund or chest in the fall; the national health agencies and international service agencies in the winter; and the Red Cross in March at locations where it does not participate in the united fund. A detailed statement of the eligibility standards, program arrangements and campaign practices is contained in the Federal Fund-Raising Manual, issued May 1963.

In recent years many Federal managers and employees have suggested that the separate drives be consolidated into a single annual solicitation to save time and expense on this work. At the same time, voluntary agency representatives have been urging that payroll deductions be authorized for the payment of Federal employee contributions, since this facility tends to increase the level of giving and to reduce the cost of collecting pledges. After extensive consultations with the Fund-Raising Advisory Council, it was agreed to try out a combined campaign with payroll

deductions in the fall of 1964 at a few representative locations in order to test the arrangements and to determine whether the expected benefits could in fact be realized.

### III. THE 1964 EXPERIMENTS

The combined campaign was approached as a matter of experiment because of expected difficulties in developing arrangements that would be fair and practical for all parties. The policies and procedures of local united funds, which customarily receive 70-85 percent of Federal employee contributions, vary widely from those of the national health agencies (10-20 percent) and the international service agencies (5-10 percent). Their differences in philosophy and method are substantial and their interests are competitive.

The general plan for the experiments was formulated jointly by management and employee representatives of the Government and national representatives of the authorized campaign organizations.<sup>1</sup> Since united funds and chests are autonomous local organizations and Federal fund-raising operations are on a decentralized basis, detailed arrangements were negotiated by local Federal and voluntary agency representatives at each of the test locations.

In overall results, the experiments were highly suc-

<sup>1</sup> The four authorized campaign organizations are as follows:

1. *A local united fund, community chest, or other local federated group which is a member in good standing of, or is recognized by, the United Community Funds and Councils of America, Inc.* The number of member agencies in a fund or chest campaign varies from around 20 to over 200 depending upon the locality.
2. *The Federal Service Campaign for the National Health Agencies.* There are 12 health agencies recognized nationally but eligibility to solicit through FSCNHA is limited to those locations where the national agency has a state or local chapter or affiliate (a) which is organized to serve the local area (county), and (b) which is not a member agency of the local united fund or chest. The number of participants in FSCNHA at any location varies from around 6 to 12.
3. *The Federal Service Joint Crusade.* There are 4 recognized international service agencies which make up this campaign group at all locations. Since their program operations are all conducted overseas, fund-raising eligibility is not limited to the places where they have local chapters or committees nor do they belong to united funds or chests at any location.
4. *The American Red Cross.* At locations where Red Cross does not raise funds in partnership with the local united fund or chest its chapters constitute a fourth campaign group.

cessful. The combined campaign was well received by management and employees. Solicitation was generally easier and quicker than in previous campaigns

and the potential for reduced costs to the Government and the voluntary agencies was apparent. Employee contributions increased substantially, as shown below:

#### A. Overall results

	Total in previous year	Total in combined campaign	Dollar increase	Percent increase
Bremerton, Wash. ....	\$85,089	\$116,492	\$31,403	37
Chicago, Ill. ....	284,000	442,379	158,379	56
Dover, N.J. ....	42,679	96,128	53,449	125
Macon, Ga. ....	208,727	342,826	134,099	64
San Antonio, Tex. ....	593,042	899,699	306,657	52
Washington, D.C. ....	4,756,201	5,720,944	964,743	20

<sup>1</sup> Estimated.

#### B. Analysis of employee participation

	Use of payroll payment		Average gift			Per capita gift	
	Percent contributors	Percent dollars	Payroll	Other	Total	1964	1965
Bremerton .....	41	60	\$16.78	\$7.64	\$11.40	\$7.31	\$9.34
Chicago .....	36	70	20.93	5.23	10.41	5.16	7.77
Dover .....	42	73	23.09	6.61	13.44	5.67	11.34
Macon .....	54	74	24.04	9.84	17.53	9.93	16.06
San Antonio .....	30	57	22.02	6.87	11.56	7.51	10.66
Washington .....	20	33	31.19	15.80	18.89	14.86	18.40

The experiments demonstrated that the basic objectives can be met successfully by a combined campaign with payroll deductions. Federal officials at the test locations recommended that CFC be continued and be made available for use widely in the Federal service. The voluntary agencies were definitely pleased with the substantial dollar increases received and wish to continue.

Various modifications in the experimental policies and procedures were recommended to correct or improve weaknesses disclosed by experience in the test campaigns. Local planning negotiations at some of the test locations had been unduly protracted and time consuming. Campaign materials generally were too complicated. The procedures for designating gifts to individual agencies caused excessive accounting time. And the arrangements for division of campaign receipts provoked substantial controversy among the campaign groups.

The CFC plan in its present form contains several provisions designed to minimize these problems. They were developed through extensive consultation with national representatives of the campaign organizations and, in several respects, represent a necessary compromise between opposing points of views. The compromise provisions have been endorsed unanimously by the Federal Fund-Raising Coordinating Group of top management and employee organization leaders in the Government, after careful consideration of the issues involved.

#### IV. LOCAL AUTONOMY

##### A. Authority of local Federal coordinating groups<sup>2</sup>

Each Federal coordinating group is authorized and requested to organize a Combined Federal Campaign in the local area for which it has fund-raising responsibility. Civilian employees and members of the Armed Forces in all Federal offices and installations in the local campaign area are to be included. The heads of executive departments and agencies will request their local officials to cooperate fully with the decisions of the Federal coordinating group on all aspects of CFC arrangements, in the interest of achieving a single, unified campaign for all Federal personnel in the local area.

Within the basic ground rules established by the Chairman of the Civil Service Commission, the local Federal coordinating group is authorized to make final decisions on all matters on which the local representatives of the campaign organizations do not reach mutual agreement after a reasonable period of negotiation, such as the details in setting ratios for division of undesignated money, in drafting campaign materials, in relative publicity, etc. The local Federal coordinating group is expected to give thoughtful consideration to the equities involved and the recommendations of each campaign organization on the matters at issue and to render impartial decisions which will promote the pur-

<sup>2</sup> For a description of these groups and their locations see Manual section 2.6 and Appendix B.

poses of the Combined Federal Campaign. The basic ground rules are set forth in Parts VI and VII and may not be changed or modified by local decision.

In the event that a local Federal coordinating group, after taking appropriate steps to initiate a combined campaign, finds in its judgment that it would be impractical to conduct CFC in its local area this year, the group's decision not to hold the campaign will be final and separate drives will proceed during fiscal 1966 as usual.<sup>3</sup> The group should report its action promptly to the Chairman of the Commission and advise the reasons why CFC cannot be held and the steps being taken to implement it in 1967.

At locations where there is a significant number of Federal personnel (as a "rule of thumb," 1,000 or more, civilian and military) and there is no Federal coordinating group in being, the head of the local Federal installation having the largest number of personnel should initiate action this year to form a Fund-Raising Program Coordinating Committee<sup>4</sup> looking toward the operation of CFC in fiscal 1967. He should notify the Office of the Chairman, Civil Service Commission, when the Committee has been established. National representatives of the campaign organizations advise that it will be difficult to undertake local planning this year at more places than those now covered by Federal coordinating groups. However, there is no prohibition against undertaking CFC this year at any location if the local Federal and voluntary agency officials agree they want it and can organize rapidly enough to conduct an effective campaign.

#### B. Local united funds and community chests

There are some 2,100 united funds and chests in the United States so it has not been possible to involve them directly in the national planning for the Combined Federal Campaign. Representatives of their national association, the United Community Funds and Councils of America, Inc., have participated fully with the other campaign organizations in evaluating the experiments and developing the final plan. They regard the arrangements as greatly improved over the 1964 experimental plan but still not acceptable to many local funds.

Since the local fund or chest is generally the predominant beneficiary of Federal employee contributions, its cooperation is essential to the implementation of CFC in any community. Accordingly, the local fund or chest will be given the opportunity freely to decide whether or not it wishes to participate with the other campaign organizations in a combined Fed-

eral campaign. Local Federal officials should explain the wishes of the Government and its employees for this arrangement and the expected increase in contributions. However, if the local united fund or chest declines to participate, the combined campaign will not be undertaken and separate campaigns by each organization will proceed in the usual manner as outlined in the Manual. Payroll deductions will be authorized only for the combined campaign arrangement.

#### C. National voluntary agencies

National representatives of the American Red Cross and the recognized<sup>5</sup> national health agencies and international service agencies have participated fully in the development of the CFC plan.

The national health agencies and international service agencies have agreed nationally to participate in CFC under the basic ground rules prescribed. Their local representatives will participate as full partners in the formulation of detailed arrangements for the local campaign, preparation of campaign materials, etc. If there is disagreement on details which cannot be resolved on a timely basis by direct negotiations between the campaign organizations, such matters will be referred with the recommendations of each organization to the local Federal coordinating group for final decision.

In the event that any of the national voluntary agencies should choose not to participate in CFC under the final arrangements decided locally it may, of course, withdraw from the campaign, but it will not have fundraising privileges in local Federal offices or installations during the fiscal year involved. This policy is in keeping with the agencies' agreement nationally to participate in CFC under the basic ground rules prescribed in the plan.

In communities where the Red Cross conducts an independent campaign in the Federal establishment in March it will be regarded as a separate campaign organization and full partner in the combined campaign. Red Cross chapters have independent authority with respect to fund-raising policy, so responsibility for deciding on participation in CFC rests with the local chapter board of directors. As with the other national organizations, in the event local Red Cross chapters choose not to participate in CFC under the final arrangements decided locally they are not au-

<sup>3</sup> This authority is intended to cover any serious local contingencies which cannot be anticipated in the national plan. For example, if a local Federal installation of predominant size is scheduled for closing in calendar year 1966 the provision for payment of pledges through payroll deductions in 1966 could make it impractical to undertake CFC this year. On the other hand, if the problem should be lack of cooperation by a local Federal agency, rather than foregoing the campaign the local Federal coordinating group chairman should telephone the Office of the Chairman, Civil Service Commission, code 202-343-7268, to obtain assistance in resolving the problem.

<sup>4</sup> See Manual, section 2.61c.

<sup>5</sup> An Eligibility Board of Federal management and employee representatives annually screens applicants for fund-raising privileges, using comprehensive standards relating to program worth, administrative integrity and financial responsibility. Agencies recognized for fiscal 1966 are: *National Health Agencies*—American Cancer Society, American Heart Association, Arthritis Foundation, Muscular Dystrophy Associations of America, National Association for Mental Health, National Association for Retarded Children, National Cystic Fibrosis Research Foundation, National Foundation-March of Dimes, National Multiple Sclerosis Society, National Society for Crippled Children and Adults, National Society for the Prevention of Blindness, and United Cerebral Palsy Associations. *International Service Agencies*—American-Korean Foundation, CARE, Inc., Project HOPE, and Radio Free Europe.

thorized to have a separate campaign in local Federal offices or installations during the fiscal year involved.<sup>9</sup>

#### V. ORGANIZING THE LOCAL CAMPAIGN

Immediately upon receipt of this plan, the local Federal coordinating group should designate a CFC Committee from among its principal members to give top policy leadership and direction to the planning and conduct of the combined campaign. Any of the authorities assigned to the group in this plan may be redelegated to the CFC Committee.

Employee representatives should be appointed to the CFC Committee, where possible from among the principal employee organizations recognized in local Federal installations, so as to insure employee participation in the planning and conduct of the campaign.

The chairman of the CFC Committee should initiate action promptly to organize and plan for the local combined campaign. Immediate action steps suggested are as follows:

1. Meet with the principal representatives of the authorized campaign organizations in the local area, i.e. the local united fund or community chest, the national health agencies, the international service agencies and, in communities where it has a separate Federal campaign, the Red Cross. Attempt to enlist their cooperation in the combined campaign. Furnish copies of the CFC plan and the Federal Fund-Raising Manual as needed.
2. Establish a local joint work group of Federal and voluntary agency representatives. Its purpose is to assemble necessary information and data, plan the detailed arrangements, identify and attempt to resolve any policy issues, and prepare the campaign materials. The work group should have a Federal chairman, other management and employee representatives as deemed advisable, and a designated representative from each of the authorized campaign organizations. If participation by the local united fund (community chest and Red Cross at some locations) is delayed because of the need to obtain formal authorization from its board of directors, request designation of a representative on a tentative basis so that preliminary planning can get underway in the meantime.
3. Insure that the joint work group's planning and materials preparation is scheduled and moves ahead rapidly and that detailed arrangements are approved and issues resolved on a timely basis by the Federal coordinating group.

#### VI. ESTABLISHING LOCAL CFC ARRANGEMENTS

*Note. The arrangements outlined in this part constitute basic ground rules for the Combined Federal Campaign. Local Federal coordinating groups are*

<sup>9</sup> Except in the case of an emergency or disaster appeal for which specific prior approval has been granted by the Chairman of the Civil Service Commission. (See Manual, section 3.52.)

*not authorized to vary from these rules except to the extent that local variations are expressly provided for.*

The local joint work group should proceed promptly to work out and recommend to the Federal coordinating group the detailed arrangements for the campaign, covering the items listed below.

##### A. Campaign name

The name will be the COMBINED FEDERAL CAMPAIGN. The title should include the year for which contributions are solicited and identification of the locality, as for example: 1966 SAN ANTONIO AREA COMBINED FEDERAL CAMPAIGN.

##### B. Campaign period

This may be any period not in excess of six weeks between September 1 and November 30, 1965. Since the Federal fund-raising program is on a fiscal year basis, the national agency campaigns to be combined in CFC are those which normally would have been held in the local area in fiscal 1966. There is no change in the timing of the 1966 national agency campaigns outside the local CFC area.

##### C. Campaign area

The exact geographic area to be covered by the combined campaign will be determined locally, taking into account past practice and the feasible scope for a single, coordinated campaign. Generally this will be the area that has been used in previous years for a coordinated campaign on behalf of the local united fund or chest. At some locations more than one united fund or chest may be involved. Clear demarcation of the campaign area is necessary, among other reasons in order that the 1966 national agency campaigns outside the CFC areas can be conducted without overlap or confusion.

##### D. Post contributions data

Each of the authorized campaign organizations should report its total dollar receipts in the last 3 years from Federal military and civilian personnel in the campaign area established in C above. For a fiscal 1966 combined campaign, this refers to contributions in on-the-job campaigns held in fiscal years 1963, 1964, and 1965. Compile a separate 3-year total for the united fund or chest, the national health agencies (FSCNHA), the international service agencies (FSJC) and, if it has an independent local Federal campaign, the Red Cross. The ratio of these 3-year totals is the base for setting the ratio for division of undesignated funds in the combined campaign.

##### E. Ratio for division of undesignated funds

Undesignated funds are the dollars donated or pledged in the combined campaign that are not designated to particular beneficiary agencies. The percentage distribution of undesignated funds among the authorized campaign organizations will be predetermined on a basis which gives effect to the past giving experience by Federal contributors in the local campaign area. A 3-year experience period is used so as to avoid severe fluctuations due to special factors affecting contributions in any one year.

The ratio of the total contributions received by each group in their local Federal campaigns during the latest three-year period will be the basic ratio for division of undesignated funds. The local joint work group may recommend adjustments in this base as needed to accommodate to: (1) inability to compile accurate data on past contributions in the local campaign area, (2) shifts of member agencies from one group to another, (3) a Red Cross emergency or disaster appeal, and (4) any other major circumstance which any of the groups believes should be considered in setting the final ratio. If the campaign organizations cannot agree on the final percentage ratio after a reasonable time for negotiation, the matters at issue will be referred with the recommendations of each organization to the Federal coordinating group for final decision.

#### F. Contributor designations

The contributor's information leaflet will identify the participating campaign groups and list their member agencies with a brief statement describing each agency's program. The leaflet will tell the contributor the predetermined ratio by which undesignated funds will be divided among the groups and of his right to designate gifts to individual agencies. Several lines will be provided on the pledge form where he may write in such designated gifts.

The right to designate will be plainly stated in the contributor's leaflet, but designations will be neither encouraged nor discouraged by keymen solicitors or in campaign publicity materials and speeches.

The CFC central accounting point will tabulate all contributor designations and allocate them to the appropriate campaign group, identified as to agency recipient. These amounts will be separate and in addition to each group's share of undesignated funds allocated on the basis of the predetermined ratio.

These arrangements are based upon experience in the 1964 experimental campaigns. They preserve the right of the contributor to make meaningful designations to agencies in which he has a special interest while avoiding a widespread fragmentation of gifts which can cause excessive accounting time and expense.

#### G. Dollar goals

A dollar goal for the overall combined campaign is recommended. Generally, it provides a focus for group spirit and unity of purpose that contributes materially to success. By apportioning the goal equitably among the Federal offices and installations, each agency shares responsibility in the team effort and has a mark to gauge its accomplishment.

In developing the proposed goal, the local work group should take into account past giving experience in local Federal campaigns, the needs and reasonable expectations of the voluntary agencies in the current campaign situation, and the probability of a substantial increase in the level of giving due to the single campaign and payroll payment plan. The objective should be to set a goal that is attainable and which can be exceeded in an enthusiastic and purposeful campaign.

Dollar goals are not required. An alternative approach, used successfully in the 1964 Chicago experi-

ment, is to rely on Fair-Share Giving as the principal incentive. The Chicago "goal" was 75 percent participation at the fair-share level.

#### II. Fair-share guides and voluntary giving

Suggested fair-share giving guides for the individual contributor should be constructed locally. The guide may be shown in the contributor's leaflet or on the pledge form. It will be accompanied by a statement that the guide is provided because employees often ask for one but that the decision to give and the amount is up to each employee.<sup>7</sup> In this connection, Federal agencies are not authorized to furnish employees an individual fair-share guide based upon the employee's specific pay or grade; a guide in this form is comparable to an individual quota or assessment which is prohibited by the Manual.<sup>7</sup> The contributor's leaflet or the pledge form will also include the express statement that the employee has the privilege of making his gift confidentially through the use of a sealed envelope which will be delivered without opening to the voluntary agencies.<sup>8</sup>

In the contributor's leaflet and other campaign publicity it will be desirable to emphasize the concept of the single annual campaign, referring to the fact that the contributor's pledge is to cover what he would have given in the three (or four) separate campaigns usually held and to point out that the privilege of extended payment through payroll withholding makes it possible for him to cover a full year's commitments at one time.

The suggested amounts of fair-share gifts should of course be structured in relation to the contributor's ability to give and the scale should be in reasonable relation to the campaign goal and the guides used in local private employment. Since payroll withholding is new, the guide should show the amount of periodic payroll deduction suggested as appropriate for various pay levels. This may be combined with or supplemented by guides for cash giving or direct-payment pledges. These are usually represented in terms of percent of annual income, number of hours' pay, or in tabular form showing suggested size of gift in relation to various income levels. For illustration, see the fair-share guide in Attachment A, which was used in the 1964 experiments at Dover, Macon and Washington. The scale in this guide was constructed around an approximate \$6,000 Federal civilian salary average and an average \$26 fair-share contribution.

#### I. Central receipt and accounting for contributions

The authorized campaign organizations should arrange, by mutual agreement, for a central receipt and accounting point in the local area for CFC contributions. This is essential in order to avoid the need for multiple pledge and report forms, which would greatly complicate on-the-job solicitation procedures, and to provide a central point for receipt of periodic remittances from Federal payroll offices during the ensuing year. Central receipt and accounting can be arranged as a joint operating activity of the campaign organizations; one of them can act as agent for all with a

<sup>7</sup> See Manual, section 5.5.

<sup>8</sup> See Manual, section 5.6.

sharing of expenses; or they may be able to obtain volunteer services from a local bank.

The central accounting point will tabulate contributions according to the designations on pledge forms and the predetermined ratio for division of undesignated funds, furnishing each campaign organization with appropriate detail regarding designations to member agencies. The final audited totals of designated and undesignated contributions to each campaign organization will constitute the ratio for distribution of receipts by the central accounting point. The campaign organizations will be responsible for distribution internally to member agencies in accordance with organization agreements.

The cost of central receipt and accounting (and other identifiable expenses such as for the printing of campaign and publicity materials) will be shared by the campaign organizations under any arrangement that is mutually acceptable to them. To avoid subsequent misunderstandings, they should reach a firm agreement in advance of the campaign specifying the nature of the expenses to be shared, the method of distribution and the time of billing. Generally, in the 1964 experiments the campaign organizations found it satisfactory to share expenses in the same ratio as their total receipts of designated and undesignated contributions. Central accounting and expense-sharing agreements are the responsibility of the campaign organizations, and the Government will not enter into their administration.

#### J. Pledge collection

The use of voluntary payroll withholding is authorized for military and civilian personnel at CFC locations in addition to the usual methods of cash contribution or direct payment of pledges. It is discretionary in the local area whether to provide for direct payment of pledges. However, a system providing only the alternative of cash or payroll deductions may tend to limit contributions from (1) low-paid employees who cannot afford the 50-cent minimum payroll allotment and (2) employees who contribute through confidential pledge. Keyman collection of installment pledges is not authorized in view of the availability of the payroll payment system.

#### K. Campaign and publicity materials

Campaign and publicity materials will be developed in the local area and will be printed and supplied by the campaign organizations. Although the type of materials needed are fairly standard in fund-raising campaigns, the variation from one location to another in size and composition of the campaign organizations and in the detailed policy and operating arrangements makes it impractical to produce materials nationally.

A single Contributor's Information Leaflet, a Pledge Form and a Payroll Withholding Authorization are to be distributed by keymen to each potential contributor. The objective should be to provide a simple and attractive package which has fund-raising appeal and essential working information. Treatment should focus on the combined campaign and homogeneous appeal without undue use of organization symbols or other dis-

tractions that compete for the contributor's attention. Extraneous instructions regarding the routing of forms, tallying contributions, etc. which are primarily for keymen should be avoided. The leaflet, the pledge and the payroll authorization may be combined into a single piece or two pieces, perforated or hinged for separation, if this is deemed desirable.

Generally, the layout and text of campaign and publicity materials are for local determination. Layouts for a contributor's leaflet and a pledge form, drafted in connection with the National Capital Area campaign, will be furnished to local Federal coordinating groups by June 1 as sample material to facilitate local development. Certain items are prescribed, as follows:

1. *Contributor's leaflet.* This will be the only informational hand-out to individual contributors. It will describe the new CFC arrangement and payroll deduction privilege, the participating campaign organizations, the provisions for designations and division of undesignated funds, etc. It will list each member agency of the campaign organizations with a brief statement of its program. While length may vary, a factual statement of about 25 words should be adequate for each agency.

Some sample text items regarding CFC are included in Attachment A for illustration.

2. *Pledge form.* This working form will go when completed to the central receipt and accounting point for the local campaign. Its format will include three or more blank lines for write-in designations.
3. *Payroll withholding authorization.* This working form will go when completed to the contributor's payroll office. There are some 1,400 separate payroll offices serving Federal personnel. Many of the departments and agencies payroll on a national or area basis and will be receiving withholding authorizations from a number of local combined campaigns. Accordingly, the authorization must be in standard format and bear adequate identification of the local campaign.

The name and mailing address of the local CFC central receipt and accounting point will be printed in the upper right corner of the form. The name should be the same as that for the campaign, including the year, as for example, 1966 SAN ANTONIO AREA COMBINED FEDERAL CAMPAIGN. The year is needed in order for the receipt point to distinguish between the last payroll remittances for one year and the first remittances for the next. The address may include "care of" identification if this is essential for mail delivery. The box headed "IDENTIFICATION NO." will be used for contributor's social security number, except in the case of agencies which have a separate payroll identification numbering system and in the military services.

The standard format and text for payroll withholding authorizations is shown in Attachment B. Generally it should be printed in sheet form. If



there are large Federal installations payrolling locally with ADP equipment they may prepare prepunched cards with the standard text. Both the sheet form and punched card form are illustrated in the attachment.

Other campaign materials which may be needed, depending upon the size of the operation and local custom include:

1. Chairmen's Guide.—For use of campaign chairmen in individual Federal installations.
2. Keyman's Guide.—Instructions for keymen about CFC arrangements, solicitation methods and forwarding procedures.
3. Keyman's Report Envelope.—With tally sheets (which may be printed on the envelope) on which the keyman will list the names of contributors or the number of confidential envelopes enclosed.
4. Miscellaneous Campaign Items.—Contributor's Receipt, "We Gave" Window Sticker, Posters, Progress Charts, Awards, etc.
5. Publicity Items.—News stories and fillers for the local press and house organs, all-employee letters, speeches for campaign leaders, division chairmen, etc.

#### VII. PAYROLL WITHHOLDING

The following policies and procedures are expected to be approved for payroll withholding operations. When all clearances are completed, final instructions will be issued through agency financial management channels. The service fee will be uniform in all departments and agencies and is expected to be approximately 2 cents per deduction. Explanatory notes are shown in parentheses.

**A. Applicability.** Voluntary payroll allotments will be authorized by all departments and agencies for payment of charitable contributions to local combined Federal campaign organizations.

**B. Allottees.** The allotment privilege will be made available to Federal personnel as follows:

1. Employees whose net pay regularly is sufficient to cover the allotment, excluding those serving under appointments limited to one year or less. (Includes part-time and substitute employees who are regularly employed. Temporaries are excluded because the extended payment plan of payroll withholding is appropriate only for contributors who are expected to continue in employment through the calendar year for which contributions are pledged.)
2. Members of the Armed Forces, excluding those on only short-term assignment in the area. (The Department of Defense will modify its military pay allotment regulations to authorize allotments for charitable contributions by service members.)

#### **C. Authorization.**

1. Allotments will be wholly voluntary and will be based upon contributors' individual written authorizations.

2. Authorization forms in standard format will be printed by the combined campaign organization at each location and will be distributed to employees along

with other campaign materials at the time charitable contributions are solicited.

3. Completed authorization forms should be transmitted to the payroll offices as promptly as possible but not later than December 15.

**D. Duration.** Authorizations will be in the form of a term allotment for one full year—26, 24 or 12 pay periods depending upon allottee's pay schedule—starting with the first period beginning in January and ending with the last pay period which begins in December. (The standardization of beginning and ending dates, except for individual discontinuances, is intended to simplify payroll operations and minimize costs.)

#### **E. Amount.**

1. Allottees will make a single allotment of an equal amount to be deducted each pay period during the year.

2. The minimum amount will be 50 cents biweekly or semimonthly, \$1.00 monthly, with no restriction on size of increment above the minimum.

3. No change of amount will be authorized during the term of an allotment.

4. No deduction will be made for any period in which allottee's net pay after all legal and previously authorized deductions is insufficient to cover the allotment; no adjustment will be made in subsequent periods to make up for deductions missed.

(These conditions are for the purpose of simplicity and economy in payroll operations. The 50-cent minimum is essential in order to keep administrative expense in reasonable relation to the amount of contributions.)

#### **F. Remittance.**

1. One check will be sent by the payroll office each pay period, in the gross amount of deductions made on the basis of current authorizations, less service fees withheld, to the combined campaign organization at each location for which the payroll office has received allotment authorizations.

2. The check will be accompanied by a statement of the number of employee deductions included and the total amount of the service charge withheld. There will be no listing of allottees included or allottee discontinuances. (No listings of individual allottees will be needed with remittances. Since these allotments are voluntary contributions which may be discontinued at will and are not otherwise collectible there would be no value, commensurate with the expense, in the campaign organizations' maintaining individual accounts on pledges serviced by a payroll allotment. The combined campaign organization will distribute payroll remittances among the participating campaign groups, and internal distribution will be made to member agencies within the groups, in accordance with proportions established on the basis of employee pledges as totaled at the close of the campaign.)

#### **G. Discontinuance.**

1. Allotments will be discontinued automatically:

- (a) On expiration of the one-year withholding period,

(b) On death, retirement, or separation of allotter from the Federal service.

2. Allotter may revoke his authorization at any time by request in writing to the payroll office. Discontinuance will be effective the first pay period beginning after receipt of written revocation in the payroll office.

3. A discontinued allotment will not be reinstated.

H. *Transfer*. When an allotter moves to an organizational unit served by a different payroll office, whether in the same or a different department or agency, his allotment authorization will be transferred to the new payroll office, unless expressly revoked by the individual. If there is a delay in receiving the transferred authorization in the new payroll office, allotter should be permitted to complete a new authorization for the remainder of the one-year withholding period, which will be considered as superseding and revoking his previous authorization.

I. *Accounting*. Establishment of individual allotment accounts, deductions each pay period, reconciliation of employee accounts, and deposit of service fees withheld will be in accordance with agency and General Accounting Office requirements.

(The simplified system provided in F. *Remittance* is intended to minimize paperwork and to eliminate the need for any accounting reconciliations between payroll office and campaign organizations. The payroll office accepts responsibility for the accuracy of remittances, as supported by current allotment authorizations and internal accounting and auditing requirements. The campaign organizations or their designated agents accept responsibility for the accuracy of distribution of remittances among the campaign groups, based upon employee pledges and arrangements for independent audit agreed upon by the participating campaign groups.)

#### VIII. ORIENTATION, TRAINING AND PUBLICITY ARRANGEMENTS

The Combined Federal Campaign involves so many new features that a formal plan should be developed by the local joint work group to cover the orientation of management and employee organization officials, training of keymen, and publicity to employees and servicemen.

It is expected that all Federal officials will assist campaign leaders by conducting an enthusiastic and purposeful solicitation in their installations in order to develop maximum group interest and response. In orientation programs, however, care should be taken to make clear that Manual policies and procedures are to be maintained intact as they apply to prohibition against individual employee quotas, assessments, or any other form of coercive action, and to the employee's right of privacy as to the amount of his gift and his privilege to contribute through use of a confidential envelope.

Since employees and servicemen may have difficulty with the new pledge and payroll withholding arrangements it is essential that keymen be trained effectively on the new procedures and be equipped to answer any questions or problem the contributors may have in this respect as well as questions of a substantive nature regarding the programs of the voluntary agencies.

Employees and servicemen should be told the background and purpose of the combined campaign arrangements, including the use of installment payment through payroll withholding. Special stress should be placed on giving enough on a once-a-year basis to provide a fair amount of support for all authorized campaign organizations.

#### IX. NATIONAL COORDINATION AND REPORTING

The Assistant to the Chairman, U.S. Civil Service Commission, is responsible at the national level for advice to local Federal coordinating groups regarding CFC arrangements. Direct communication by mail and telephone is recommended.

Manual Appendix B lists the locations of Field Coordinating Groups. If there are Fund-Raising Program Coordinating Committees at locations not listed they should promptly notify the Assistant to the Chairman so they can be added to the mailing list for receipt of any supplementary information or instructions issued.

All chairmen of Field Coordinating Groups are requested to furnish reports to the Assistant to the Chairman, as follows:

1. *Before July 1*.—a report that CFC is being undertaken locally next fall, or a statement of the reasons why it has been determined to be impractical. Furnish information and data as follows:

- (a) CFC campaign area.
- (b) Estimated number Federal personnel to be solicited, separate for civilian and military.
- (c) Receipts in past fiscal year by each campaign organization from Federal personnel in CFC area.
- (d) Ratio for division of undesignated funds.

2. *Before January 1*.—a report of campaign results, as follows:

- (a) Basic data.—Number solicited, Number contributors, Total receipts, Per capita gift.
- (b) Payroll deductions.—Number authorizing, Total pledged.
- (c) Designations.—Summary totals, by campaign organization.
- (d) Final distribution ratio for division of designated and undesignated receipts.
- (e) Narrative summary evaluation of CFC arrangement based upon campaign experience.

\* \* \* \* \*



## SAMPLE TEXT ITEMS

WHAT IS THE COMBINED FEDERAL CAMPAIGN? It's a one-time solicitation for voluntary health and welfare agencies. The (name of local united fund) and the National Health and International Service Agencies which normally would solicit next spring are cooperating locally in a single campaign for Federal personnel. This will be the only fund-raising drive for voluntary agencies this year.

HOW DID IT COME ABOUT? Many employees have asked for a single charity drive. It can save a great amount of time and expense for the Government and the voluntary agencies. One drive makes it practical, too, to have a payroll payment plan. The combined Federal Campaign has the full endorsement of the heads of executive departments and agencies and the presidents of major employee organizations.

WHY PAYROLL PAYMENT? Employees and servicemen want to contribute their fair share. Payroll payment helps you to do this because you spread your gift in small installments over a full 12 months. What you give does not depend upon how much cash you have on hand at the time you are solicited. Remember, your one-time pledge covers all charitable contributions on the job this year.

The payroll payment plan is available to all civilian employees, except those with a temporary appointment of less than one year, and to members of the Armed Forces who are assigned in this area. Its use is optional and voluntary with the contributor, under the ground rules which the Government has set to keep down payroll withholding costs:

1. Minimum allotment per payday is 50¢ if you are paid every two weeks or twice a month, or \$1 if paid monthly. Above these minimums, allotment may be in any amount.
2. Withholding in the amount authorized will be for a full year beginning with the first pay period in January 1966. You may discontinue the allotment at an earlier date upon written request to the payroll office, but you cannot change the amount or begin payroll payment again in 1966.

HOW ARE PLEDGES DIVIDED AMONG THE CAMPAIGN ORGANIZATIONS? A proportionate amount for each of the campaign organizations has been worked out on the basis of their past receipts from Federal personnel in this area, as shown below. If you want to designate a special amount for any of the agencies participating in these organizations, write the name and amount in the space provided on the pledge form and your designation will be honored.

(Name of local united fund) \_\_\_\_\_ *Percent*  
National health agencies \_\_\_\_\_  
International service agencies \_\_\_\_\_  
Total \_\_\_\_\_ 100

SUGGESTED SCALE OF GIVING. Everyone wants to help his fellowman, but the question is frequently asked "What's my share?" Of course, there's no single answer. The Guide below suggests what a fair share of the campaign goal would be for those at various income levels. It is not to be regarded as a quota or an assessment on any individual. The decision to give and the amount is up to you.

Be as generous as you can.

*Fair share giving guide*

Annual income	Suggested annual contribution	Suggested biweekly <sup>1</sup> allotment
Up to \$4,000_____	\$5-13. 00	\$0. 50
5,000_____	19. 50	. 75
6,000_____	26. 00	1. 00
7,000_____	32. 50	1. 25
8,000_____	39. 00	1. 50
9,000_____	45. 50	1. 75
10,000_____	52. 00	2. 00
11,000_____	58. 50	2. 25
12,000_____	65. 00	2. 50
13,000_____	78. 00	3. 00
14,000_____	91. 00	3. 50
15,000_____	104. 00	4. 00
16,000_____	117. 00	4. 50
17,000_____	130. 00	5. 00
18,000 and over_____	( <sup>2</sup> )	( <sup>2</sup> )

<sup>1</sup> Twice this if payday is monthly.

<sup>2</sup> Proportionately higher.

Make checks payable to "Combined Federal Campaign."

Contributions are tax deductible.

Contributors who use direct payment have the option of making a confidential gift through the use of a sealed envelope which will be delivered without opening to Combined Federal Campaign Headquarters.

**PAYROLL WITHHOLDING AUTHORIZATION FOR  
VOLUNTARY CHARITABLE CONTRIBUTIONS****1966 NATIONAL CAPITAL AREA  
COMBINED FEDERAL CAMPAIGN****P.O. Box 1526  
Washington, D.C. 20013**

NAME	(First Name)	(Initial)	(Last Name)	IDENTIFICATION NO.
AGENCY	BUREAU OR OFFICE			LOCATION

**FILL IN BLANK BOX OR CHECK BOX SHOWING THE AMOUNT OF YOUR ALLOTMENT**

Minimum amount for use of payroll withholding is 50¢ each pay day  
if paid every two weeks or twice monthly; \$1.00 if paid monthly.

\$	\$5.00	\$4.00	\$3.00	\$2.00	\$1.00	\$0.75	\$0.50
----	--------	--------	--------	--------	--------	--------	--------

I hereby authorize the above-named agency or any other agency of the U.S. Government by which I may be employed during 1966 to deduct the amount shown above from my pay each pay period during calendar year 1966, starting with the first period beginning in January 1966 and ending with the last pay period which begins in December, provided that the amounts so deducted shall be remitted to the Combined Federal Campaign shown above. I understand that this authorization may be revoked by me in writing at any time before it expires.

TO FEDERAL PAYROLL OFFICES—If the contributor moves to the jurisdiction of another payroll office before 1967, this authorization should be forwarded.

Contributor's  
Signature.....

Date.....

Format approved by Comptroller  
General, U. S. 7-23-64

IDENTIFICATION NO.	NAME
1	2
3	
INSTALLATION OR AGENCY	

FORM #2

002108

**1966 SAN ANTONIO AREA  
COMBINED FEDERAL CAMPAIGN  
(Address)****PAYROLL WITHHOLDING AUTHORIZATION FOR VOLUNTARY CHARITABLE CONTRIBUTIONS**

FILL IN BLANK  
BOX OR CHECK  
BOX SHOWING  
THE AMOUNT  
OF YOUR  
ALLOTMENT

MINIMUM AMOUNT FOR USE OF PAYROLL WITHHOLDING IS 50¢ EACH PAY DAY IF PAID  
EVERY TWO WEEKS OR TWICE MONTHLY, \$1.00 IF PAID MONTHLY

\$	\$5.00	\$4.00	\$3.00	\$2.00	\$1.00	\$0.75	\$0.50
----	--------	--------	--------	--------	--------	--------	--------

I hereby authorize the above-named agency or any other agency of the U.S. Government by which I may be employed during 1966 to deduct the amount shown above from my pay each pay period during calendar year 1966, starting with the first period beginning in January 1966 and ending with the last pay period which begins in December, provided that the amounts so deducted shall be remitted to the combined Federal campaign shown above. I understand that this authorization may be revoked by me in writing at any time before it expires.

TO FEDERAL PAYROLL OFFICES—If the contributor moves to the jurisdiction of another payroll office before 1967, this authorization should be forwarded.

DATE

CONTRIBUTOR'S SIGNATURE

Format approved by Comptroller General, U.S. 7-23-64

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COMPTROLLER GENERAL OF THE UNITED STATES  
WASHINGTON 25

JUL 29 1954

E-119740

The Honorable  
The Attorney General.

Dear Mr. Attorney General:

Reference is made to your letter of April 16, 1954, relative to the collection by Federal employees of funds for charitable purposes and group hospitalization payments.

As you point out, it is recognized that a large number of Federal employees are participants in group hospitalization plans for which the collection of monthly payments on a group basis results in a financial saving to the participating employees, and that there are also a number of worthy charities with which the various Government agencies have cooperated in fund-raising campaigns.

You request advice as to whether the services of Federal employees may be utilized during official working hours for the following purposes:

"a. The collection of funds for a consolidated charity drive whereby funds are solicited at one time for all the various charitable campaigns throughout the year.

"b. The collection of funds for individual charitable campaigns throughout the year.

"c. The collection of Group Hospitalization monthly payments from fellow employees."

While no decision of this Office, or of the courts, dealing precisely with the propriety of Federal employees making any of the above-described collections has been found, the accounting officers have had occasion to consider various other situations involving the exercise of administrative discretion with respect to the performance of or excuse from duty of employees. In a decision dated September 20, 1895, 2 Comp. Dec. 173, the method of employment of a department's employees was held to rest wholly within the executive discretion of the head of the department. See, also, 21 Comp. Dec. 203, October 8, 1914. More recently,

this Office has recognized the discretion of an administrative agency to excuse per annum employees from the performance of duty without a charge to annual leave in certain cases of emergency conditions. 28 Comp. Gen. 111; 32 id. 189. Also, this Office has not questioned the authority of administrative agencies to permit an employee to be excused from work without charge for leave for the purpose of making a blood donation. 30 Comp. Gen. 521.

It is understood that one or more of the collections in question here are made in most if not all of the agencies of the Government by employees during working hours. So far as is known to this Office, these collections involve only a relatively small part of the time of a few employees and may not be said to constitute an abuse of administrative discretion. Accordingly, if you decide to permit employees in your Department to make any of the collections in question here during working hours, this Office would not question such practice, assuming of course that such employees are not hired specifically for, or do not devote substantial periods of time to, that purpose.

Consideration of the last two questions presented in your letter does not appear to be required in view of the foregoing.

Sincerely yours,

FRANK H. WEITZEL

Acting Comptroller General  
of the United States